

Files, Attachments and the Catalog Dashboard



This Focus Guide is designed for Spitfire Project Management System users. In this guide you will learn how to use the Catalog Dashboard and its filter features; what you can do with files in your system; and how to work with attachments.

www.spitfiremanagement.com

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About Our Documentation

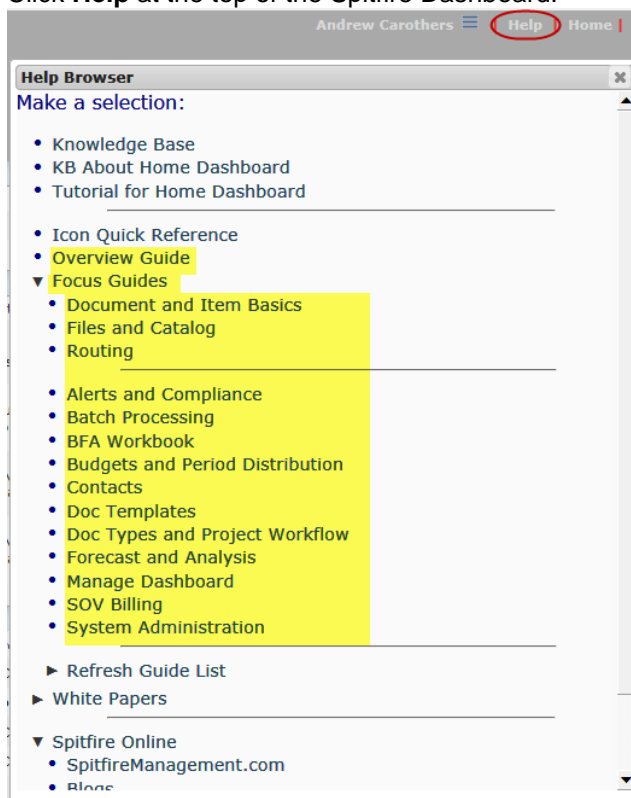
The Spitfire Project Management System (sfPMS) is extensive and powerful. Learning about all that you can do with it takes time. To help you learn, we provide various forms of documentation. Because one large all-inclusive manual would be too unwieldy and take too long to download, we provide smaller units of documentation—guides, knowledge base articles, and white papers.

Guides

Our guides, which include an [Overview Guide](#) and various other guides, focus on specific areas or tasks in sfPMS. Often, one Focus guide will refer you to a second Focus guide when an overlapping section is described in more detail in the second guide. By reading the guides, you will get a good understanding of the system in general and you will learn procedures for how to do many of the things that sfPMS allows you to do. We suggest you read the [Overview Guide](#) first, followed by other Focus guides as needed.

To access the guides:

1. Log in to sfPMS.
2. Click **Help** at the top of the Spitfire Dashboard:

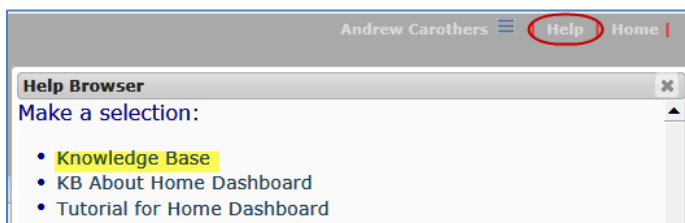


3. Select either **Overview Guide** or one of the choices under **Focus Guides**:

The guide will appear as a PDF file.

The Knowledge Base

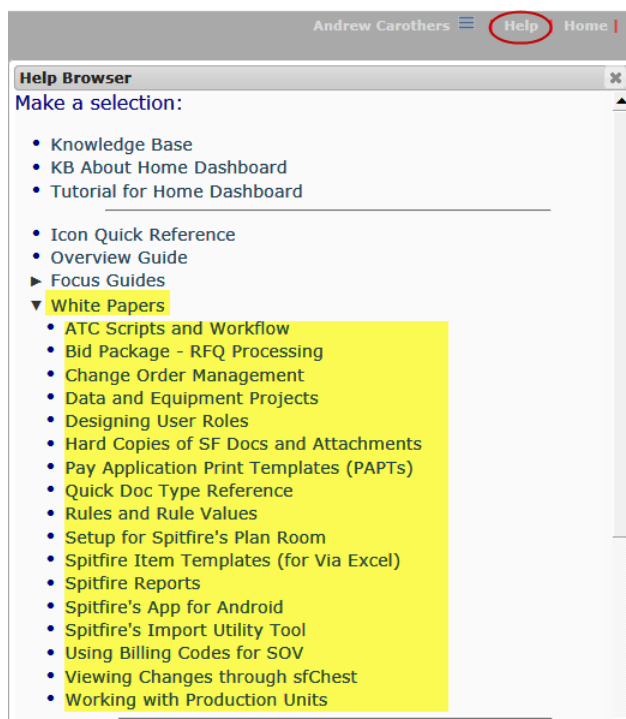
The Knowledgebase contains articles, often in a question-and-answer format, that cover either more specific or more technical information about sfPMS. The Knowledgebase is accessed through the same Help menu as the guides:



Articles in the Knowledgebase are numbered, for example, KBA-01044.

White Papers

White papers are documents that delve into some of the more technical or specific aspects of sfPMS. White Papers are accessed through the same Help menu:



Introduction to This Guide

The Catalog Dashboard gives you quick access to all or some of the files uploaded or scanned into your Spitfire Project Management System (sfPMS) and all or some of the documents in your projects, depending on your access level.

Both Spitfire documents and files can be Attachments on a document.

This guide focuses on the Catalog Dashboard and its filter features; what you can do with files in your system; and how to work with attachments.

Note: it is possible to set up sfPMS to integrate with a Cloud storage provider so that project participants who are not Spitfire users may access files in the cloud. For more information, contact your implementer and see the [Setup for Cloud Drive Integration](#) technical white paper.

This guide assumes some familiarity with sfPMS and its dashboards as described in the [Overview Guide](#). It also assumes a general understanding of the documents being used in your system. (See the [Focus on Document and Item Basics](#) guide for more information about documents.)

Note: Because sfPMS is configurable and because different users have different levels of access rights and permissions, the screens shown and the fields described in this guide may not be the same as those in your system.

Note: section, chapters and text that are new or changed from the V4.5 documentation appear with **green text** and sometimes an *. In addition, icons are shown in size 16 only; larger sized icons are similar but not exactly the same.

Files vs. Documents

The terms “files” and “documents” are used very specifically in sfPMS to refer to two different things.

Files

A file is any electronic file uploaded or scanned into sfPMS, such as Microsoft Word documents, CAD files, PDF files, and scanned AP invoices. Links (such as website URLs) are a special type of file. Emails are another type of file. In short, if it is created outside of sfPMS and then uploaded or scanned in, it is a file. A file can be attached to a Spitfire document or just uploaded to the Catalog.

sfPMS stores all of your attached, uploaded and scanned files in the Catalog and is capable of storing multiple versions of the same file so that you can have a history of its versions. You can view as well as edit files that are in the Catalog.

Documents

A document is a specific entity created in sfPMS from one of the Spitfire Doc types. There are many Doc types in the system, each with its own specific purpose. In systems that are integrated with Microsoft Dynamics SL, some documents are linked to Microsoft Dynamics SL forms (e.g., Commitments, POs) and some are not (e.g., Meeting Minutes, Drawings). Because Doc types can be configured (in Spitfire-Enterprise), the Doc types available to you might not be the same as Doc types referred to in this guide. Some examples of Spitfire Doc types are Bid, Budget, Change Order, Commitment, Competitive Bid, Daily Field Report, Forecast, Inspections, Pay Applications, Pay Request, Punchlist, RFI, RFQ, Submittal, and Warranties. Most documents are created through the Project Dashboard. Documents can be attached to other Spitfire documents.

Documents are explained in greater detail in the [Focus on Document and Item Basics](#) and the [Focus on Doc Types and Project Workflow](#) guides.

The Catalog Dashboard

The Catalog Dashboard offers an overview or library of all of your files and documents. It can contain files not associated with a specific project, but nevertheless relevant to your company (budget templates, procedural documents, etc.).

Note: Security and permissions apply in the Catalog just as they do on other dashboards and projects. For example, if you cannot access a project, then you cannot access files linked to that project in the Catalog.

When you first access the Catalog Dashboard, only two filter parameters are displayed:

The screenshot shows the top of the Catalog Dashboard. At the top left are 'Home' and 'Catalog' tabs, with 'Catalog' highlighted. Below this is a 'SEARCH' bar. Under the search bar are two checkboxes: 'INCLUDE DOCUMENTS' and 'INCLUDE FILES'. Two yellow callout boxes point to these checkboxes. The first callout points to 'INCLUDE DOCUMENTS' and says: 'Check this box if you want to search for documents.' The second callout points to 'INCLUDE FILES' and says: 'Check this box if you want to search for files.'

Filters

Include Files Only

If you click only the **Include Files** checkbox, certain filter fields will appear:

The screenshot shows the search filters section of the Catalog Dashboard. The 'INCLUDE FILES' checkbox is checked, and the 'INCLUDE DOCUMENTS' checkbox is unchecked. The filters are organized into two columns. The left column contains: 'TYPE' (a dropdown menu), 'CONTACT' (a text field with a lookup icon), 'REF DATE' (a date range selector with '9/24/2014' on both ends), 'MAX ITEMS' (a text field with '200'), and 'TEXT' (a text field). The right column contains: 'COMPANY' (a text field with a lookup icon), 'DOC #' (a text field), 'DATE' (a date range selector with '09/23/2013' and '09/24/2014', and a checked 'Date' checkbox), 'PROJECT ID' (a text field with a lookup icon), 'PER PAGE' (a text field with '16'), and 'FILE NAME' (a text field). At the bottom right are a 'Search' button and an 'AUTO REFRESH' checkbox. Two yellow callout boxes provide additional information. One callout points to the lookup icon in the 'CONTACT' field and says: 'Click [lookup icon] where available to use the lookup feature.' Another callout points to the 'Date' checkbox and says: 'The **Date** checkbox is checked by default. Change the date range or uncheck Date if desired.'

Note: Per Page, Max Items and Preview are not filter fields. They affect how the results of your search will appear.

Include Documents Only

If you click only the **Include Documents** checkbox, certain filter fields will appear:

Search interface showing filters for documents only. The **INCLUDE DOCUMENTS** checkbox is checked. The **TYPE** dropdown is highlighted with a callout: "Select a Doc type from the drop-down." The **TEXT** input field is highlighted with a callout: "Enter text in any field that is not a lookup field." The **HAS FILES** dropdown is set to "Either" with a callout: "You can list documents with or without attached files, or both." Other filters include **DATE** (09/23/2013 to 09/24/2014), **INCLUDE CLOSED** (unchecked), **RESPONSIBLE**, **CONTACT**, **SOURCE #**, **DUE** (9/24/2014), **STATUS**, **PROJECT ID**, **MAX ITEMS** (200), **PER PAGE** (16), and **AUTO REFRESH** (unchecked).

Attribute Filters

If you select a Doc **Type** (such as RFI), the **Has Attributes** filter appears. If you select an Attribute, the related **Attribute Value** filter appears:

Search interface showing attribute filters. The **TYPE** is set to "RFI". The **HAS ATTRIBUTE** dropdown is set to "Instruction" and the **ATTRIBUTE VALUE** dropdown is set to "Alternate Proposal", both highlighted with yellow callouts. Other filters include **DATE** (09/23/2013 to 09/24/2014), **INCLUDE CLOSED** (unchecked), **RESPONSIBLE**, **CONTACT**, **SOURCE #**, **DUE** (9/24/2014), **STATUS**, **PROJECT ID**, **MAX ITEMS** (200), **PER PAGE** (16), and **AUTO REFRESH** (unchecked).

Specialty Filter

If you select **Vendor** as your Doc type, and click **Project Purchasing**, the **Specialty** filter appears:

Search interface showing the specialty filter. The **TYPE** is set to "Vendor" and the **PROJECT PURCHASING** checkbox is checked, both highlighted with yellow callouts. The **SPECIALTY** dropdown is highlighted with a yellow callout. Other filters include **DATE** (12/15/2014 to 12/16/2015), **INCLUDE CLOSED** (unchecked), **RESPONSIBLE**, **CONTACT**, **SOURCE #**, **DUE** (12/16/2015), **STATUS**, **PROJECT ID**, **MAX ITEMS** (200), **PER PAGE** (16), and **AUTO REFRESH** (unchecked).

The **Specialty** filter assumes a wildcard after what you type. Type the beginning of what you want to find and the filter will return all documents whose subcontractor CSI codes begins with those letters or numbers. For example, if you type **16** (for electrical) you might get documents whose CSI codes are 16000, 16100, 16202, etc.

Include Documents and Files

You can include both documents and files in your search. All the filter fields will then be available.

The screenshot shows the 'SEARCH' filter interface. On the left, under 'INCLUDE DOCUMENTS', there are fields for TYPE (dropdown), RESPONSIBLE (lookup), CONTACT (lookup), DATE (range: 9/23/2013 to 9/24/2014), REF DATE (range: 9/24/2014 to 9/24/2014), HAS ATTRIBUTE (dropdown), PROJECT ID (lookup), and a PREVIEW checkbox. On the right, under 'INCLUDE FILES', there are fields for REFERENCE (lookup), COMPANY (lookup), DOC # (text), SOURCE # (text), DUE (range: 9/24/2014 to 9/24/2014), a checkbox for 'INCLUDE CLOSED', STATUS (dropdown), HAS FILES (dropdown with 'Either' selected), MAX ITEMS (200), PER PAGE (16), and FILE NAME (text). At the bottom right are 'Search' and 'AUTO REFRESH' checkboxes.

All filter fields serve to limit your search to the criteria you enter.

Contact and Company Fields

You cannot filter by **Company** and **Contact** at the same time. When one of these fields is populated, (and you <Tab> out) the other disappears until the first is blank again. In addition, when one of these filters is populated, two additional filters appear:

This screenshot shows the 'SEARCH' filter interface with the 'SCOPE' dropdown menu open. The 'SCOPE' dropdown is highlighted in yellow and shows options: 'Any Contact From Responsible Source Contact To' and 'ED'. The 'COMPANY' field is populated with 'Able Electric' and is highlighted in yellow. Below it, the 'COMPANY WIDE' checkbox is checked and highlighted in yellow. Other filter fields like DATE, REF DATE, and DUE are also visible.

The **Scope** limits the search of the contact or company and the **Company Wide** checkbox expands it.

Note: in the Company field, as well as other lookup fields, you can type directly in the field and the system's autocomplete function will show you possible matches. You can select a match.

<i>If this lookup</i>	<i>And this Scope</i>	<i>And Company Wide</i>	<i>Results</i>
Company	From	Is not checked	Documents and files on which the From addressee is the company
Company	From	Is checked	Documents and files on which the From addressee is anyone linked to the company
Company	Responsible	Is not checked	Documents and files on which the Responsible party is the company
Company	Responsible	Is checked	Documents and files on which the Responsible party is anyone linked to the company
Company	Source Contact	Is not checked	Documents and files on which the Source Contact is the company
Company	Source Contact	Is checked	Documents and files on which the Source Contact is anyone linked to the company
Company	To	Is not checked	Documents and files on which the To addressee is the company
Company	To	Is checked	Documents and files on which the To addressee is anyone linked to the company
Company	Any Contact	Is not checked	Documents and files on which any of the above scopes is anyone linked to the company
Company	Any Contact	Is checked	Documents and files on which any of the above scopes is anyone linked to the company
Contact	From	Is not checked	Documents and files on which the From addressee is the contact
Contact	From	Is checked	Documents and files on which the From addressee is anyone linked to the same company as the contact
Contact	Responsible	Is not checked	Documents and files on which the Responsible party is the contact
Contact	Responsible	Is checked	Documents and files on which the Responsible party is anyone linked to the same company as the contact
Contact	Source Contact	Is not checked	Documents and files on which the Source Contact is the contact
Contact	Source Contact	Is checked	Documents and files on which the Source Contact is anyone linked to the same company as the contact
Contact	To	Is not checked	Documents and files on which the To addressee is the contact
Contact	To	Is checked	Documents and files on which the To addressee is anyone linked to the same company as the contact
Contact	Any Contact	Is not checked	Documents and files on which any of the above scopes is the contact
Contact	Any Contact	Is checked	Documents and files on which any of the above scopes is anyone linked to the same company as the contact

Project Field

You can type the full Project ID in the **Project** field, but if your Project ID is masked, you cannot include hyphens. For example, **GC003** will bring you results, but the masked **GC-003** will not.

Commitment and Cost Code Filters

If you enter a **Project** (and <Tab> out of the field), additional filters for documents (**Commitment** and **Cost Code**) appear:

The screenshot shows a search interface with two main sections: 'INCLUDE DOCUMENTS' and 'INCLUDE FILES'. The 'COMMITMENT' field is highlighted in yellow and contains the value 'GC003'. The 'COST CODE' field is also highlighted in yellow and contains the value 'Northern Lights Office Bldg'. Other filters include 'TYPE', 'RESPONSIBLE', 'CONTACT', 'SOURCE #', 'DUE', 'HAS ATTRIBUTE', 'ATTRIBUTE VALUE', 'MAX ITEMS', 'TEXT', 'REFERENCE', 'COMPANY', 'DOC #', 'DATE', 'REF DATE', 'STATUS', 'HAS FILES', 'PER PAGE', and 'FILE NAME'. The 'SEARCH' button and 'AUTO REFRESH' checkbox are at the bottom right.

You can type a DocNo in the Commitment field or use wildcards (see below) to identify a Commitment. All documents that are related to the identified Commitment(s) will be listed in the search results.

Wildcards and Logical Operators

Tip

Additional advanced searching techniques are described in [KBA-01044](#).

Certain fields, such as **Doc #**, **File Name** and **Project**, allow you to use the wildcard % for your search. For example,


GC% returns all projects beginning with GC
%123% returns all projects with 123 in the Project ID
%001 returns all projects ending with 001
[cg]% returns all projects beginning with c or g

In the **Text** filter you can use logical operators (common to SQL). Any phrases with two or more words that you want to search for as a unit must be within quotation marks. For example:

Logical Operator (in all caps)	Returns documents/files that contain:
hammer AND nail	the word hammer and the word nail
"knotty pine" AND NOT oak	the phrase knotty pine but not the word oak
"parking lot" OR "underground garage"	the phrase parking lot or the phrase underground garage
Electrical NEAR wiring	the word electrical near the word wiring

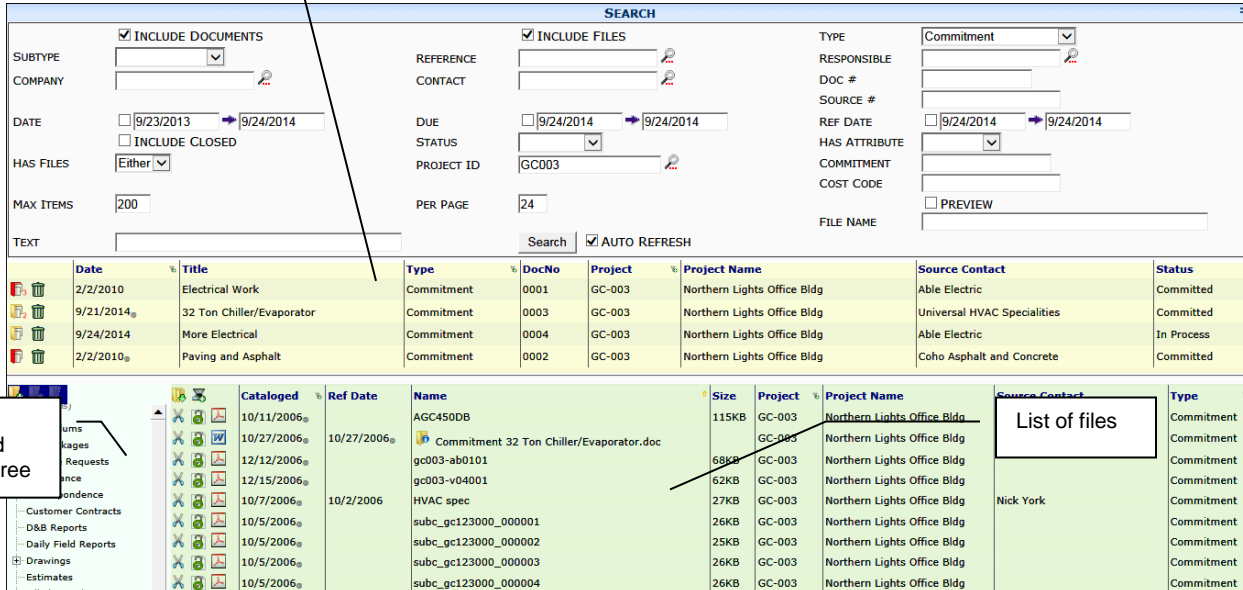
Search Results

To search for a document or file (or both):

1. Click either the **Include Document** or the **Include File** checkbox or both. The appropriate filter fields will appear.
2. Enter your criteria using the <Tab> key to get from one field to the next.
3. Click .

Search results appear below the filter section. Documents, if any, appear directly below the filter section. Files, if any, appear below the documents, as shown in the following example:

List of documents



Document Search Results:

Date	Title	Type	DocNo	Project	Project Name	Source Contact	Status
2/2/2010	Electrical Work	Commitment	0001	GC-003	Northern Lights Office Bldg	Able Electric	Committed
9/21/2014	32 Ton Chiller/Evaporator	Commitment	0003	GC-003	Northern Lights Office Bldg	Universal HVAC Specialties	Committed
9/24/2014	More Electrical	Commitment	0004	GC-003	Northern Lights Office Bldg	Able Electric	In Process
2/2/2010	Paving and Asphalt	Commitment	0002	GC-003	Northern Lights Office Bldg	Coho Asphalt and Concrete	Committed

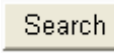
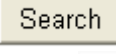
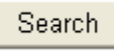
User-defined folder tree

List of files

Cataloged	Ref Date	Name	Size	Project	Project Name	Source Contact	Type
10/11/2006		AGC450DB	115KB	GC-003	Northern Lights Office Bldg		Commitment
10/27/2006	10/27/2006	Commitment 32 Ton Chiller/Evaporator.doc	68KB	GC-003	Northern Lights Office Bldg		Commitment
12/12/2006		gc003-ab0101	62KB	GC-003	Northern Lights Office Bldg		Commitment
12/15/2006		gc003-v04001	62KB	GC-003	Northern Lights Office Bldg		Commitment
10/7/2006	10/2/2006	HVAC spec	27KB	GC-003	Northern Lights Office Bldg	Nick York	Commitment
10/5/2006		subc_gc123000_000001	26KB	GC-003	Northern Lights Office Bldg		Commitment
10/5/2006		subc_gc123000_000002	25KB	GC-003	Northern Lights Office Bldg		Commitment
10/5/2006		subc_gc123000_000003	26KB	GC-003	Northern Lights Office Bldg		Commitment
10/5/2006		subc_gc123000_000004	26KB	GC-003	Northern Lights Office Bldg		Commitment


Tip

If the folder tree is displayed, you can click on a particular folder if you want to limit the files displayed to that folder.

Note: After your results are displayed and while you are still in this dashboard, you can change certain filter information and the results will be updated immediately. However, if you leave the dashboard and return to it later, you will need to click  again in order to update the results. Certain filters also require the  button. If you don't see your results updated immediately, click .

Document List

Documents that match your filter criteria appear in a document list.

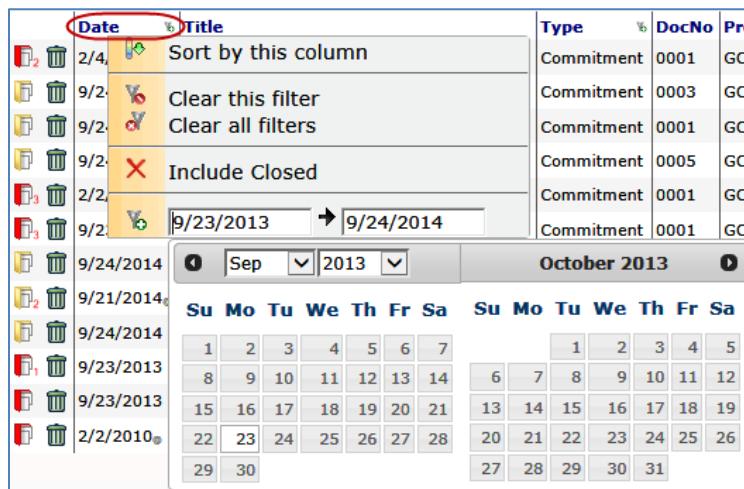
	Date	%	Title	Type	%	DocNo	Project	Project Name	Source Contact	Status
 	2/4/2010		Commitment for Indoor Lights and Wiring	Commitment		0001	GC-202	KC Store	Margie and Sons	Committed
 	9/24/2014		Construction Engineering	Commitment		0003	GC-010	Le Restaurant de la Lune	Wingtip Engineers	Committed
 	9/24/2014		Site Work Excavation	Commitment		0001	GC-010	Le Restaurant de la Lune	Tailspin Excavation	Committed
 	9/24/2014		Metal work	Commitment		0005	GC-010	Le Restaurant de la Lune	Lucerne Metal Fabrication	Committed
 	2/2/2010		Electrical Work	Commitment		0001	GC-003	Northern Lights Office Bldg	Able Electric	Committed
 	9/23/2013		Electrical Work	Commitment		0001	GC-005	Fabrikam, Inc.	Able Electric	Committed
 	9/24/2014		Electrical Systems	Commitment		0004	GC-010	Le Restaurant de la Lune	Able Electric	Committed
 	9/21/2014		32 Ton Chiller/Evaporator	Commitment		0003	GC-003	Northern Lights Office Bldg	Universal HVAC Specialties	Committed
 	9/24/2014		More Electrical	Commitment		0004	GC-003	Northern Lights Office Bldg	Able Electric	In Process

Columns

- **Date:** the day the document was created.
- **Title:** the title of the document (from the document's Description field).
- **Type:** the Doc type.
- **DocNo:** the document number.
- **Project:** the project to which this document belongs.
- **Project Name:** the name of the project (from the Project Setup).
- **Source Contact:** the source contact on the document (for example, the Vendor or Responsible person) if any.
- **Status:** the current status of the document.

Column Filters

The **Date**, **Type**, **DocNo**, and **Status** columns offer a drop-down menu when you click anywhere on the header. This options menu allows you to sort the column, filter on the column, include closed documents, and clear filters.








The screenshot shows the 'Date' column header with a red circle around it. A dropdown menu is open, showing the following options:

- Sort by this column
- Clear this filter
- Clear all filters
- Include Closed
- 9/23/2013 → 9/24/2014

Below the menu, there is a calendar view for September 2013 and October 2013. The calendar for September 2013 shows dates from 1 to 30. The calendar for October 2013 shows dates from 1 to 31.


Actions on Documents

To open and close a document:


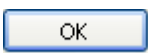

1. Click  (or , , ) at the row of the document you want to open. The document will appear in a separate window.
2. Click  at the document header when you want to close the document.

TIP

For more information about role capabilities, see the System Administrator or the technical white paper [Designing User Roles](#).










If you have the **DOC | Can Delete an entire document completely (RS)** role capability, you can delete documents that appear in the document list. (If you do not have this permission, the  icon will not appear). **Note:** *Deleting a document should be done with caution!*

To delete a document:

1. Click  at the row of the document you want to delete.
2. Click  at the confirmation box that appears.
3. Click  at the top of the Catalog Dashboard in order to make your deletions permanent.

File List

Files that match your filter criteria (or, optionally, are in a specified folder) appear in the file list.

		Cataloged %	Ref Date	Name	Size	Project	Project Name	Source Contact	Type
			10/11/2006	Acme_Sub_Qual	63KB				Commitment
			10/7/2006	AcmeMeeting.doc	33KB	GC-003	Northern Lights Office Bldg		RFI
			10/11/2006	AGC450DB	115KB	GC-003	Northern Lights Office Bldg		Commitment
			12/12/2006	Cert_Ins_Liab	460KB			Adventure Works Architecture	
			10/5/2006	Certificate Insurance	2.0MB	GC-003	Northern Lights Office Bldg		Cert & Appr
			10/11/2006	City Water and Sewer Permit Application	24KB				Permits
			10/11/2006	City Water and Sewer Permit Receipt	24KB	GC-003	Northern Lights Office Bldg		Permits
			12/20/2006	city_hall	243KB	GC-006	City Hall Renovation		Photo
			12/21/2006	city_sky_line	74KB	GC-001	Stevens Office Building		Photo

These icons are explained in pages 21, 56 and 63.

Columns

- **Cataloged:** the date the file was added to the Catalog.
- **Ref Date:** a reference date for the file. A file can be associated with any date through the [Properties](#) option on the File Options menu (see page 58).
- **Name:** the name of the file.
- **Size:** the size of the file (KB or MB).
- **Project:** the project to which the file was added, if any.
- **Project Name:** the name of the project (from the Project Setup).

TIP

If you click on a link to get to another page in this guide, you can use the Alt + ← (left arrow) keys to return to the previous view.

- **Source Contact:** a source contact associated with the file as entered through the [Properties](#) option on the File Options menu (see page 58).
- **Type:** the Doc type associated with the file. If a file is attached to a document, that document's Doc type is associated with the file. Otherwise, a file can be associated with a Doc type through the [Properties](#) option on the File Options menu (see page 58).
- **Note:** the note associated with the file, as entered through the [Properties](#) option on the File Options menu (see page 58). This column is normally hidden; see "Column Filters" below for how to show this column.
- **Other:** other information, as entered through the Properties option on the File Options menu ([see page 59](#)). This column is normally hidden and requires configuration through the UI Configuration tool in order to be visible.

Column Filters

The **Cataloged**, **Ref Date**, **Name**, and **Type** columns offer a drop-down menu when you click anywhere on the header. This options menu allows you to sort the column, filter on the column, show/hide preview thumbnails, show/hide the **Note** column, and clear filters.

	Cataloged %	Ref Date	Name	Size
	10/11/2006		Acme_Sub_Qual	
	10/7/2006		AcmeMeeting.do	
	10/11/2006		AGC450DB	
	12/12/2006		Cert_Ins_Liab	
	10/5/2006		Certificate Insur	
	10/11/2006		City Water and S	
	10/11/2006		City Water and S	

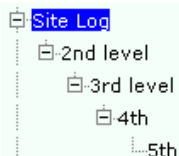
Toggle Sort
 Clear this filter
 Clear all filters
 Preview
 Show Note Column

Actions on Files

The most common action to take on files is to open and view them from the files list. There are various other [tasks you can do with files](#), all of which are explained beginning on page 24.

Folders

Folders provide an effective way of organizing your files in sfPMS. Files can be placed in folders and moved to other folders. Folders can contain sub-folders, which can contain their own subfolders, for example:

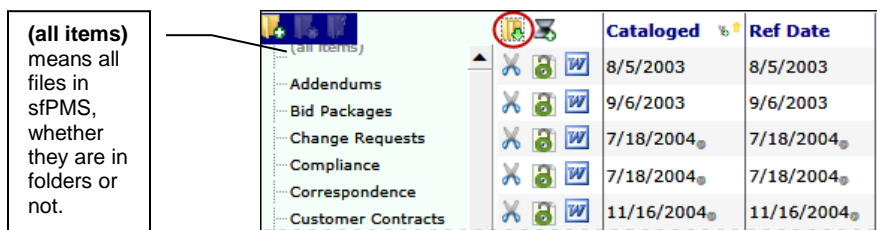


The folders that are established on the Catalog Dashboard can also be seen on all Project Dashboard's File part. This means that individual projects cannot have different folder trees—all projects share the folder structure from the Catalog Dashboard. For this reason, **it is important to plan the Catalog folders appropriately**. Any changes to the folder structure made at the Catalog will affect all projects.

All folders in your system appear on the file folder tree. However, you might not have permission to see the contents of all the folders in your folder tree.

File Folder Tree

The file folder tree appears to the left of the file list. You can show or hide the folder tree through the toggle at the top of the file list:

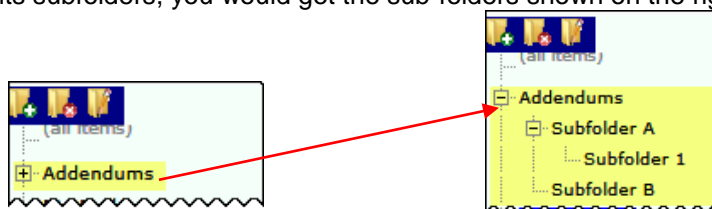


When looking for a file, you can find it by navigating to the appropriate folder in addition to, or instead of, using filters. When you click on a folder name, only files in that folder appear in the file list.

Note: You may have to expand a folder in order to get to the folder that contains the file(s) you want.

To expand folders:

- Folders preceded by can be expanded to show sub-folders. For example, if you clicked on on the Addendums folder and its subfolders, you would get the sub-folders shown on the right:



To collapse folders:

- To collapse sub-folders back into the main folder, click by the main folder name.


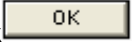
Add, Delete, Rename Folders



TIP

For more information about role capabilities, see the technical white paper [Designing User Roles](#).


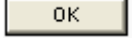
Some folders were probably created during your implementation of sfPMS. However, if you have the **PART | Maintain Catalog and Report folders (RIUD)** role capability, you can add, delete and rename folders at any time. Remember that what you add and delete will affect the Files part on all Project Dashboards.

To add a folder:

1. (optional) If you want the new folder to be a sub-folder under another folder, click on the existing folder name.
2. Click  at the top of the folder tree.
3. In the dialog box that appears, enter a name for your folder, then click .


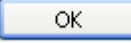

Note: If your new folder is a main folder, it will appear at the bottom of the folder tree. If it is a sub-folder, then its main folder will have a  next to it. You have to click  to see or get to your new folder.

To rename a folder:

1. Click on the folder name you want to change.
2. Click  at the top of the folder tree.
3. In the dialog box that appears, change the name of your folder then click .

To delete a folder:

Important Note: Deleting a folder does NOT delete the files in the folder.


1. Click on the folder you want to delete
Note: if you want to delete a sub-folder, get to it by expanding its main folder.
2. Click  at the top of the folder tree. A confirmation box will appear.
3. Click  if you really want to delete the folder, or  to cancel.













Note: If you delete a folder that had sub-folders, the folder will be deleted and the sub-folders will be promoted up one level. In addition, if you delete a folder that contains files, those files will be promoted up one level (either placed in another folder or in the root.)


WARNING

Since access to files in the catalog is controlled by permission to folders, deleting a folder can change the ability for certain users to see or access files.

Files in Folders







When you don't specify a folder for the file list, all files (that meet filtering criteria) are listed. Those that are in a folder are indicated by , for example:



	Cataloged %	Ref Date	Name	
	10/11/2006		Acme_Sub_Qual	63
	10/7/2006		AcmeMeeting.doc	33
	10/11/2006		AGC450DB	12
	12/12/2006		Cert_Ins_Liab	42
	10/5/2006		Certificate Insurance	22
	10/11/2006		City Water and Sewer Permit Application	22
	10/11/2006		City Water and Sewer Permit Receipt	22
	12/20/2006		 city_hall	22
	12/21/2006		 /Site Photos	72

If you mouse over the , the name of the folder containing that file appears.

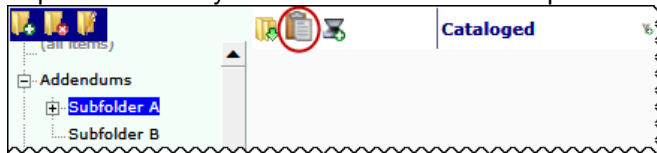
Files that do not contain the icon are not in any folder. Files in existing folders as well as files that are not in any folders can be moved into any of the folders in the folder tree.


To move a file into a folder:

1. Using filters if desired, search for your file so that it appears on the file list.
2. Click  to show the folder tree, if it is hidden. The  icons will not appear unless the folder tree is visible.
3. Click  at the row of the file you want to place in the folder. The  will change to .
4. (optional) Click  at other files that you want to also move into the same folder.

Note: You can click  at any file to change it back to  if you change your mind about wanting to move that file.

5. Click on the folder name where you want to move the file(s). Expand folders if you need to. You'll notice a paste icon.



6. Click . All marked files will be moved to the indicated folder

Overview on How to Add Files to the Catalog

There are several ways that files get added to the Spitfire Catalog. These methods are summarized below.

Upload Site Photo

From the Photo Part of the Project Dashboard

You can upload a photo for a specific project through an upload dialog opened from the Photo part . The uploaded file becomes the most recent photo shown on the Project Dashboard, shows up in the Files part of the Project Dashboard and is included in the Catalog Dashboard. For more information, [see page 26](#).

Add Files Tool

From the Catalog Dashboard

You can use the Add Files tool to upload or scan a file, as well as to add a website link or email, to the Spitfire Catalog. Files that are thus added to the Catalog need not be part of any project, nor attached to any particular document.

From the File Part of a Project Dashboard

You can use the Add Files tool to upload or scan a file for a specific project. This file will show up in the project's File part (on the Project Dashboard), as well as in the Catalog Dashboard.

From the Attachment Tab

You can use the Add Files tool from a document's Attachment tab to attach a file to that particular document. Once attached to a document, the file will appear in the corresponding Project Dashboard as well as in the Catalog Dashboard.

You can attach a file to the document in general or to a specific Item on the document. For more information, [see page 49](#). For more information about the [Add Files tool](#), see page 27.

Drag and Drop


From the Attachment Tab

You can drag files from your computer onto a document's Attachment tab to attach those files to that particular document. Once attached to a document, the files will appear in the corresponding Project Dashboard as well as in the Catalog Dashboard. For more information, [see page 45](#).

You can also drag and drop files to the Add Files tool.

Create from Template Feature

From the Attachment Tab

If an Attachment template is available for the Doc type, you can create a file from the template through the  icon. The file is attached to the document and thus also added to the Catalog. Files can also be created automatically from an Attachment (auto) or Attachment (all) template. For more information, [see page 51](#).


Reply Emails

From Via Email Routees


If you route a document to a Via Email routee and that routee attaches a file in the reply email, that file is attached to the document's Attachment tab and thus also added to the Catalog (assuming the reply email is processed correctly). For more information, see the [Focus on Routes](#) guide.

Emails from Mobile Devices

From the Inbox

If properly set up, you can email any file to be attached to a particular document through the  icon. The file would thus be added to the Catalog.

From the Attachment Tab

You can email any file to be attached to a particular document through the  icon. The file would thus be added to the Catalog.

For more information, [see page 78](#).

Overview on What You Can Do with Files

There are several things you can do with the files in the Catalog and with attached files on your documents. What you can do is described in detail where indicated and summarized below.

Note: all actions assume you have the necessary access and permissions.

Attach Catalog File to a Document

No matter how a file was added to the Catalog, that file can be attached to a particular document at any time through the **DocAttach** tool.

For more information, [see page 46](#).

Route Files

Any file that is attached to a document can be routed to other people, as appropriate.

For more information, see the [Focus on Routes](#) guide.

Catalog files that are not attached to a document can nevertheless also be routed through a special **Catalog File Route** document.

For more information, [see page 60](#).

Delete Files

You can delete files from the Catalog. Once deleted, files are permanently removed from the Spitfire system.

For more information, [see page 61](#).

Rename Files*

You can rename files through in-place editing wherever files are listed. For more information, [see page 62](#).

View Files

sfPMS allows for various ways to view a file. Depending on setup and the applications on your workstation, you may be able to view a file through its native application (e.g., in Adobe Reader or Microsoft Word or Microsoft Excel, etc.).

For more information, [see page 63](#).

Edit Files

If you have the proper application (such as Microsoft Word or Excel) on your workstation, you can edit certain Catalog files and “check in” your revised versions.

For more information, [see page 65](#).

Approve Files

Most sites approve files automatically when they are added to the system. However, if automatic approval has been turned off, you can manually approve files as well as revoke approval of files.

For more information, [see page](#) 69.

Export Files

You can export files from the Catalog onto your computer.


For more information, [see page](#) 71.

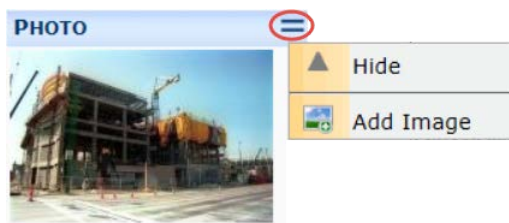
Download Files

You can download files from the Catalog onto your computer through a zipped file.



For more information, [see page](#) 75.

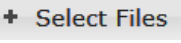
Upload Site Photo

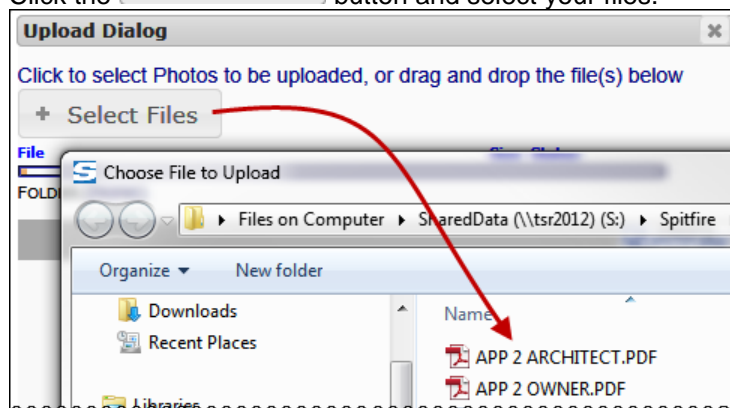
If you click the  icon from the Photo part of a Project Dashboard, any uploaded file is defaulted into the Site Photo folder for the project and used as the most recent photo that appears on the Photo part.




To upload a photo:

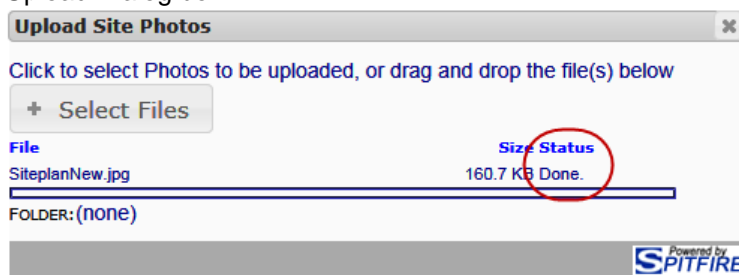
1. Click  to open the drop-down options menu.
2. Select  **Add Image**. An Upload Dialog box will appear.
3. Either

- o Click the  button and select your files.



- o **Drag and drop the file to the area next to the button.**

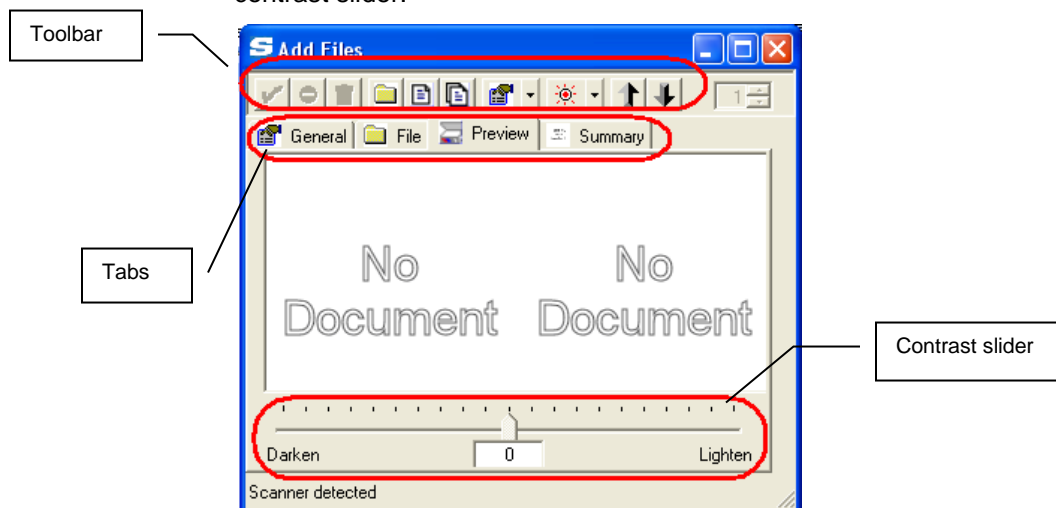
4. When the status on the window says Done, click  to close the Upload Dialog box.





Your uploaded file will appear in the Photo part.

Add Files Tool

The Add Files tool has four tabs, a toolbar and (in the Preview tab) a contrast slider:

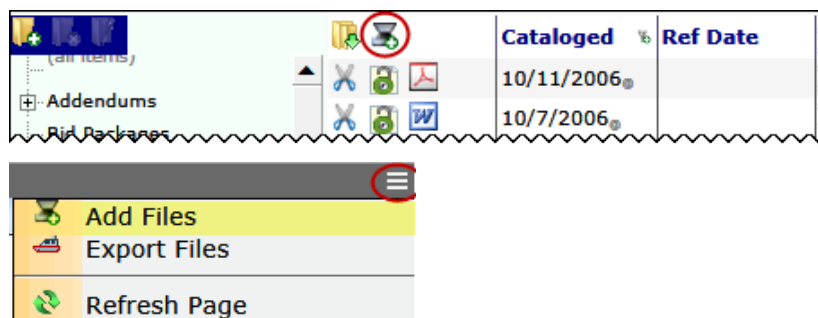


Access Points

You can add files to the catalog through the Add Files tool, which is accessed through the  icon. The  icon appears in various locations in sfPMS.




The Catalog Dashboard

If you open the Add Files tool from the file list on the Catalog Dashboard or from the Catalog Options menu, you can upload or scan files that are not part of any project (although you can also specify a project for those files).



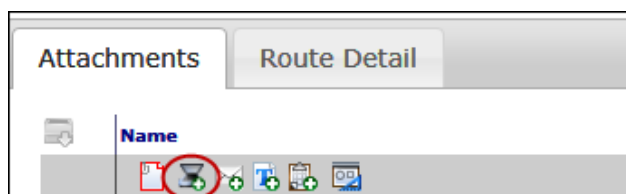
The Project Dashboard

If you open the Add Files tool from the Files part on a Project Dashboard, any files uploaded or scanned into the Catalog are also made part of, and available to, the particular project.

FILES			
	Cataloged	Ref Date	Name
	10/7/2006		AcmeMeeting.doc
	10/11/2006		AGC450DB

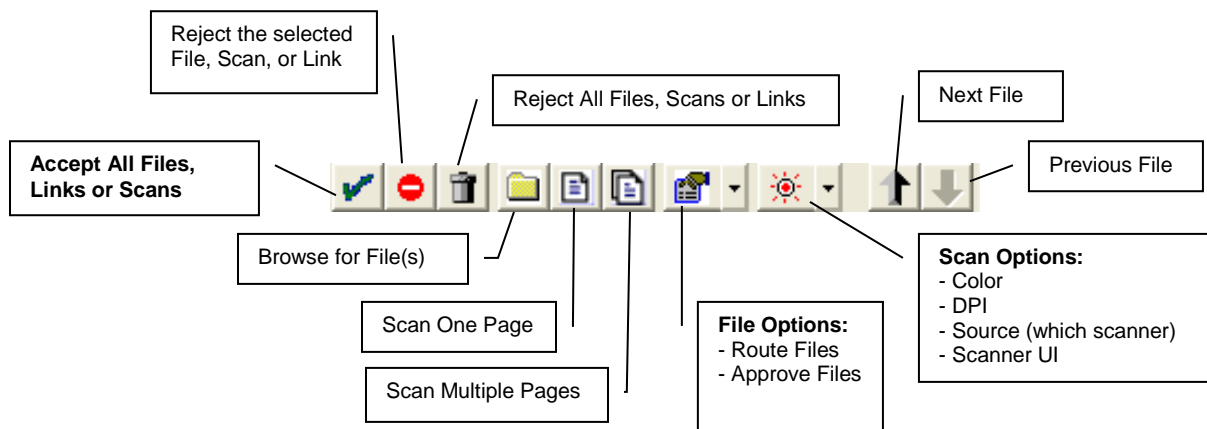
The Attachment Tab

If you open the Add Files tool from a document's Attachment tab, any files uploaded or scanned into the Catalog are also attached to the document and made part of, and available to, the particular project.



The Toolbar

You can use the toolbar from the various tabs in the Add Files tool:



The Tabs

General Tab

The General tab displays information about the file. All of the information on this tab is very useful when you use the search feature to find a file, but none of the information is required. Some of the fields on this tab are lookups.

The screenshot shows the 'Add Files' dialog box with the 'General' tab selected. The 'Source Document' section contains fields for Name (with a hint '(setting default values)'), Doc #, Rev #, and Batch #. Below this are fields for Type, Note (containing 'Will appear on Attachment tab'), Other, Project, Ref. Date (set to 11/ 3/2010), Source Contact, Internal, and Folder (set to root). Each of these fields has a search icon to its right. At the bottom of the dialog, a status bar indicates 'Scanner detected'.

Notes


- The **Note** field populates the Note field on the Attachment tab, if the uploaded/scanned file is attached to a document.

Attachments		Route Detail
Name	Size	Note
web_capital_construction	265KB	This is a note about...

The **Note** field can also be used for image captions.

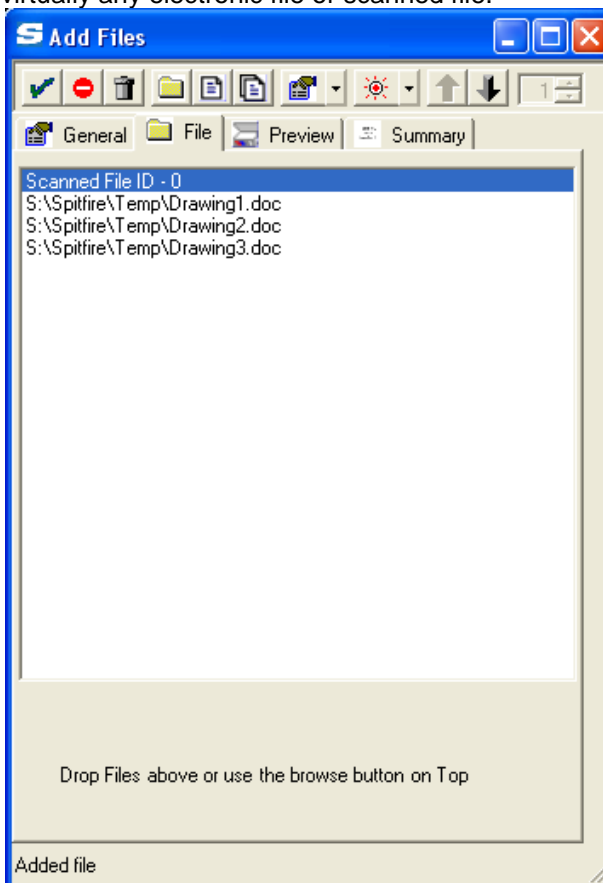
- To make the file part of a particular project, look up the desired **Project**.
- You can place the file in a particular **Folder** by browsing for the folder () or selecting a folder from the drop-down. When you browse, you will see the folder tree as set up on the Catalog Dashboard.

File Tab

The File tab lists all the files that will be uploaded to sfPMS when you click the  button. Files can be images, text files, CAD files, or virtually any electronic file or scanned file.

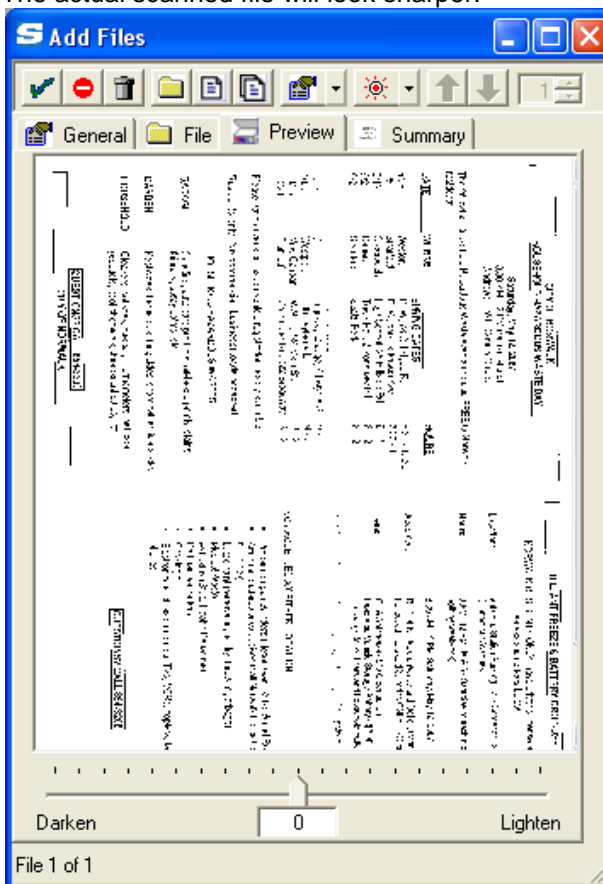
TIP

For information on the maximum file size that can be uploaded, see [KBA-01147](#).



Preview Tab

The Preview tab gives you an idea of what a scanned file will look like. The actual scanned file will look sharper.

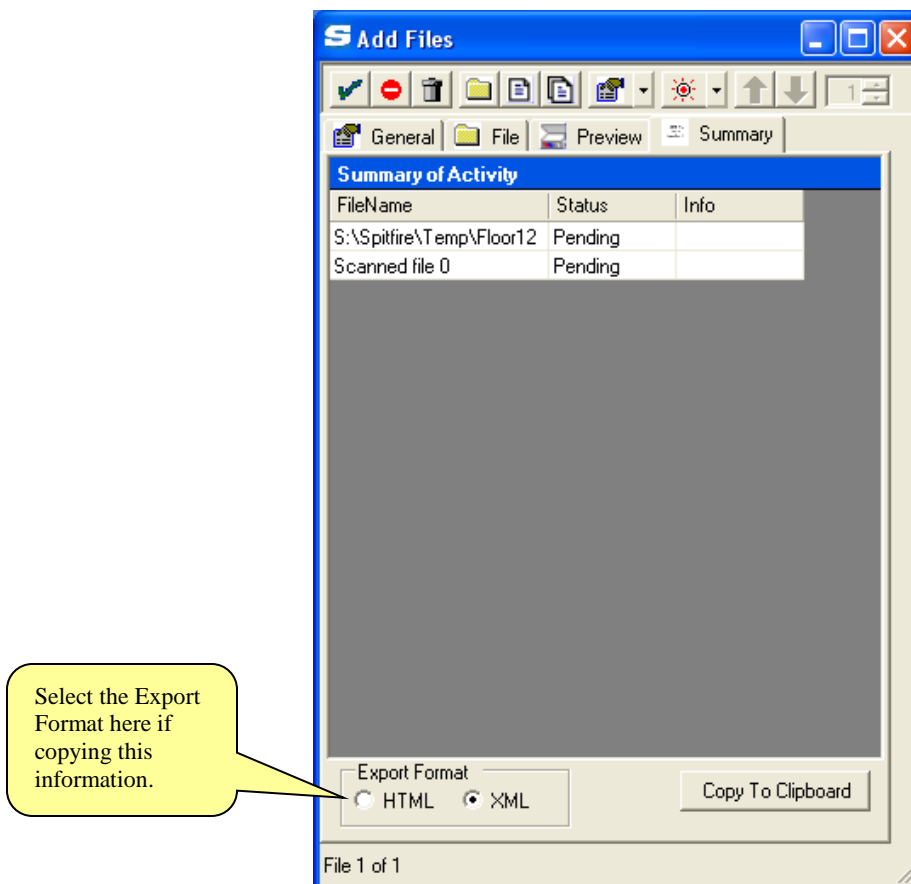


Note:

- You can use the slider at the bottom to lighten or darken the image.



Summary Tab

The Summary tab lists the files included in the upload, along with any error messages that might occur. You can copy the summary into a file outside of sfPMS:



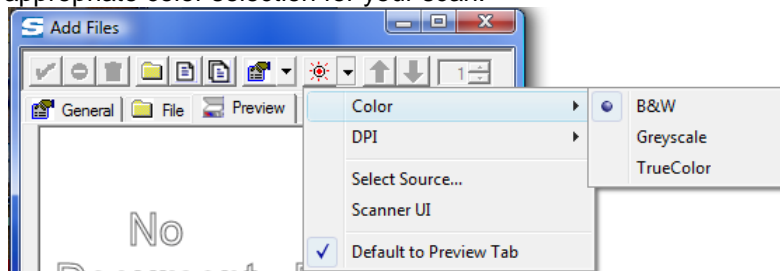
Scanning Files

To scan a one-page file:

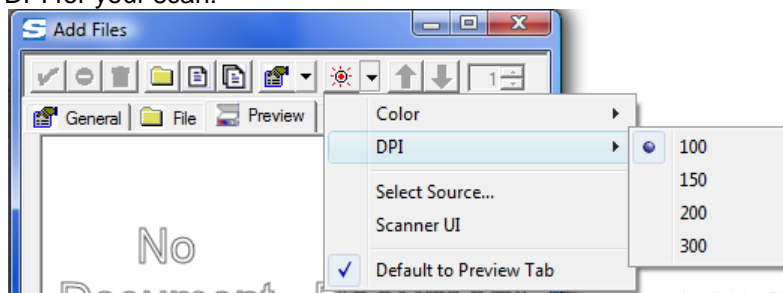
1. Place the page you want to scan on your scanner.
2. Click  to open the Add Files tool.
3. Click on the Preview tab. When you scan the file, you'll be able to see it in the Preview tab.
4. (optional) Click , select **Color**, then click on the appropriate color selection for your scan:


TIP

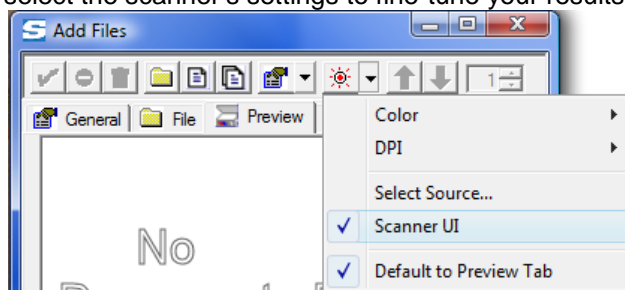
For moderate scanning, any TWAIN compliant scanner will work with the Add File tool.



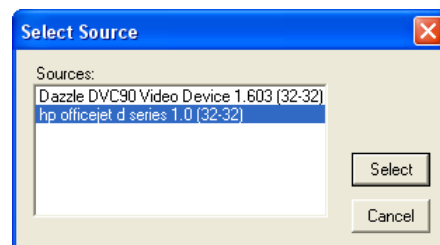
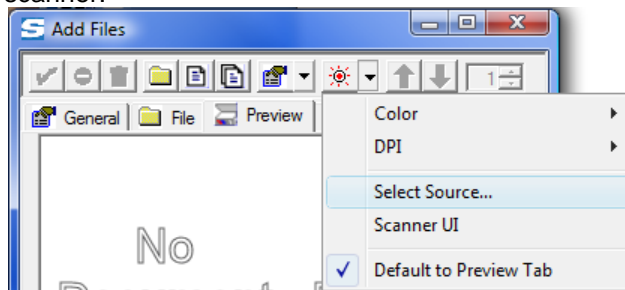
5. (optional) Click  select **DPI**, then click on the appropriate DPI for your scan:



6. (optional) Click  then select **Scanner UI**. Additional prompts will appear after you begin scanning so that you can select the scanner's settings to fine-tune your results.



7. (optional) Click  , select **Select Source**, then select your scanner.




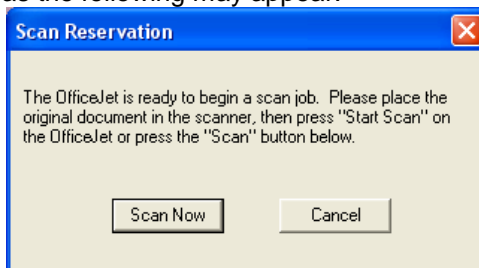
TIP


Scanner and Color Resolution Note:

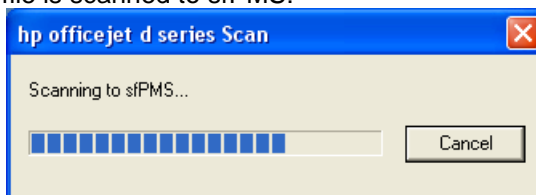
Scanner: If you do not select a Scanner and set the Scanner UI, the settings you last set will be used.

Color Resolution: If you do not select a color resolution, the setting you last set will be used.





8. Click . Depending on your scanner set up, a message such as the following may appear:




- o Click  when you are ready to start scanning.
9. An information box such as the following will appear while your file is scanned to sfPMS:

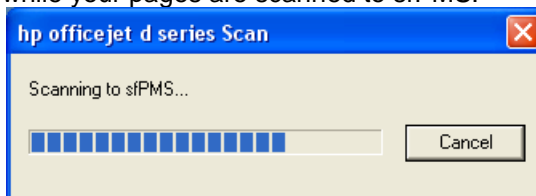


Your scanned file will appear in the Preview tab.


10. (optional) Click  to reject the page (if you don't like the way it came out, for example). You can then click  again to rescan).
11. (optional) Use the contrast slider at the bottom of the window to adjust the image's contrast.
12. Click the General tab and enter a Note, if you want a note to be associated with this file. You may also want to enter (or browse for) a **Folder** in which to put your scanned file. (More information [about folders](#) is found on page 19.)
13. (optional) [Approve or route the file](#) as described on page 37.
14. Click  to accept your scanned file (or click  to reject the file).

To scan a multiple-page file or multiple files:

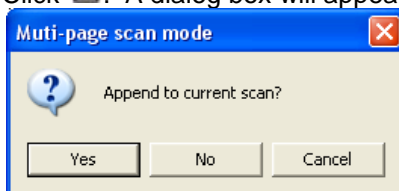
1. Start the same way you would if you were scanning one page (i.e., steps 1-7 described above).
2. Click . An information box such as the following will appear while your pages are scanned to sfPMS:

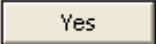
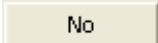
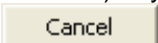




TIP

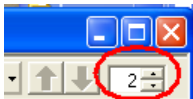
If you scan your pages using an ADF (automatic document feeder), you can skip steps 3 and 4; all pages will be scanned when you click .





3. Click . A dialog box will appear:



4. If you want to scan a second page of the same file, click . If you want to scan a second page that is actually a new file, click . (In either case, you'll have to place the second page on the scanner first.) If you don't want to scan a second page after all, click .



5. (optional) After a page has been scanned, you can click  to reject the page (if you don't like the way it came out, for example. You can then click  again to rescan).
6. (optional) If your scanned file has more than one page, you can use the number box at the top to get to your pages:





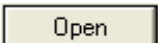



7. (optional) If you scanned more than one file, you can click  or  to review your different files.
8. For each file, click the General tab and enter a keyword. (At least one keyword per file is suggested.) You may also want to enter (or browse for) a **Folder** in which to put your scanned file(s).
9. Click  to accept all your scanned pages/files (or click  to reject all the pages/files).

Uploading Files

TIP


If the Notes and Catalog folder for each uploaded file is the same, enter this information before you add your files to the File tab. That way your Note and Folder will apply to all the files you add to the File tab. If you add your files/links to the File tab and then move to the General tab to add Note and a Catalog Folder, use the   button to move to the Next or Previous file/link.

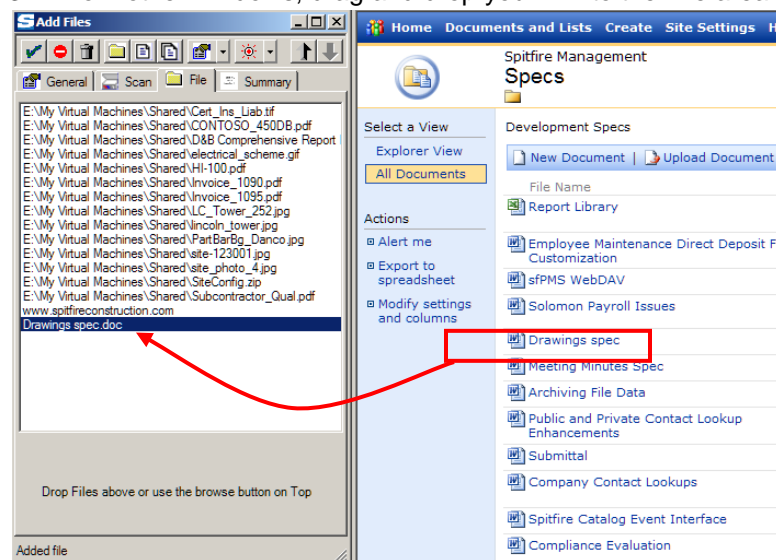
To upload a file that is on your workstation:

- Click  to open the Add Files tool.
- Click the File tab.
- Either drag-and-drop files from your computer to the File area -or-
Click  to browse your computer for the file(s) you want to upload then
 - Select the file(s) and click .
- (optional) Select a file and click  to remove it from the list. Click  to remove all the files from the list.
- Click  to accept the file(s).

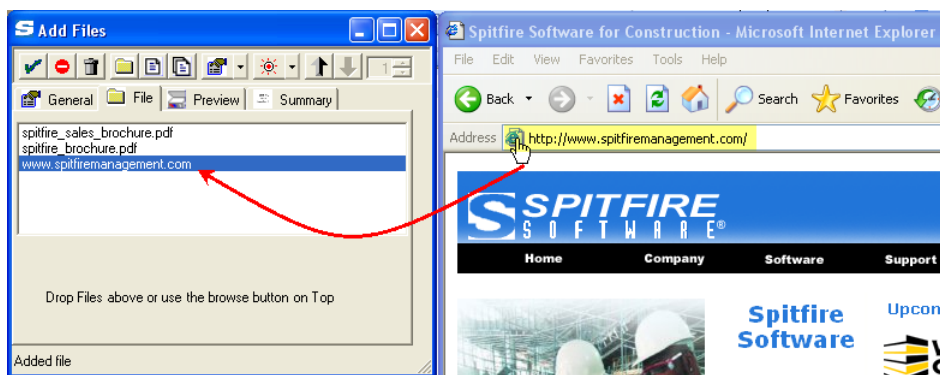
Links to information elsewhere, such as URLs that take you to websites, are considered a type of file in sfPMS. As such, you can add links to the Catalog and as attachment to documents.

To add a link:



1. Click  to open the Add Files tool.
2. Click the File tab.
3. From other windows, drag and drop your link to the File area.



A link from a SharePoint file



A URL from the Internet

4. Click  to accept your link(s).
5. Click  to close the Add Files tool.
6. Back at the Catalog, the links will appear in the file list.
7. Click on a link to go directly to the external file or website.


TIP

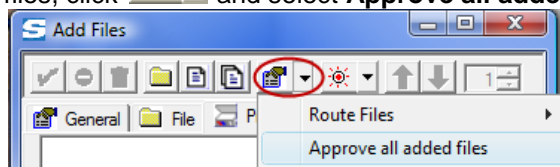
You can [approve and route files](#) that have been uploaded. See page 37.


Approving and Routing Scanned/Uploaded Files

Your site may be set up so that all uploaded and scanned files are approved automatically. However, if automatic approval is turned off, and you have the permission to do so, you can approve files during the scan/upload process. You can also choose to route files either individually or as a group through the [Catalog File Route document](#) (see page 60).


To approve your scanned/uploaded file(s):

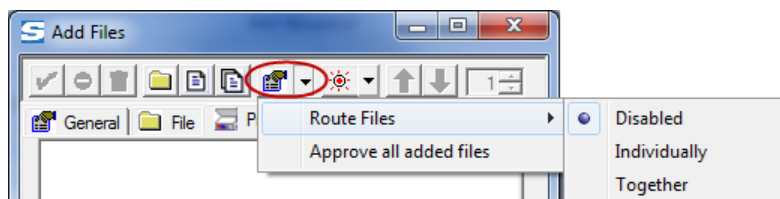
1. After scanning or uploading your files but before accepting your files, click  and select **Approve all added files**.



2. Click  to accept all your scanned pages/files. The files will be approved.


To route your scanned/uploaded file(s):

1. After scanning or uploading your files but before accepting your files, click  and select **Route File**.



Tip

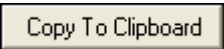
For more information on setting up and using the Catalog File Route document, see [KBA-01245](#).

2. If you are routing one file, select **Individually**; if you are routing multiple files, select either **Individually** or **Together**, depending on whether you want all files routed together or not.
3. Click  to accept all your scanned pages/files. Your file(s) will be routed through the Catalog File Route document.

Exporting the Upload Summary

The Summary tab lists the files uploaded to sfPMS as well as any errors in uploading. You can export (copy) this list to Microsoft Word or Excel.

To copy the summary:

1. At the Summary tab, click the HTML radio button if you want the summary in a format suitable for an application such as Microsoft Word or click the XML radio button if you want the summary in a format suitable for Microsoft Excel.
2. Click . The contents of the Summary tab will be placed in your Clipboard.
3. Open an application outside of sfPMS (for example, Microsoft Word or Microsoft Excel).
4. Paste the contents of the Clipboard into the application.

Attachments

Documents can have attachments. Those attachments are any combination of scanned, uploaded or drag-and-dropped files and other documents.

Example 1

The image shows three overlapping screenshots of the Spitfire Project Management System interface, illustrating a document chain. Red arrows indicate the flow from the Meeting Minutes document to the Issue document, and then to the Permit document.

Meeting Minutes-Agenda (Weekly meeting 17):

- DOC#: 0017
- PROJECT: GC-003
- SUBJECT: Weekly meeting 17
- STATUS: Agenda
- DATE: 01/09/2010
- Attachments: Utility Connection Design Change Issue - 0001

Issue-In Process-GC (Utility Connection Design Change):

- DOC#: 0001
- PROJECT: GC-003
- DESCRIPTION: Utility Connection Design Change
- STATUS: In Process-GC
- DATE: 09/25/2014
- Attachments: City Water and Sewer Permit Permits - 0001

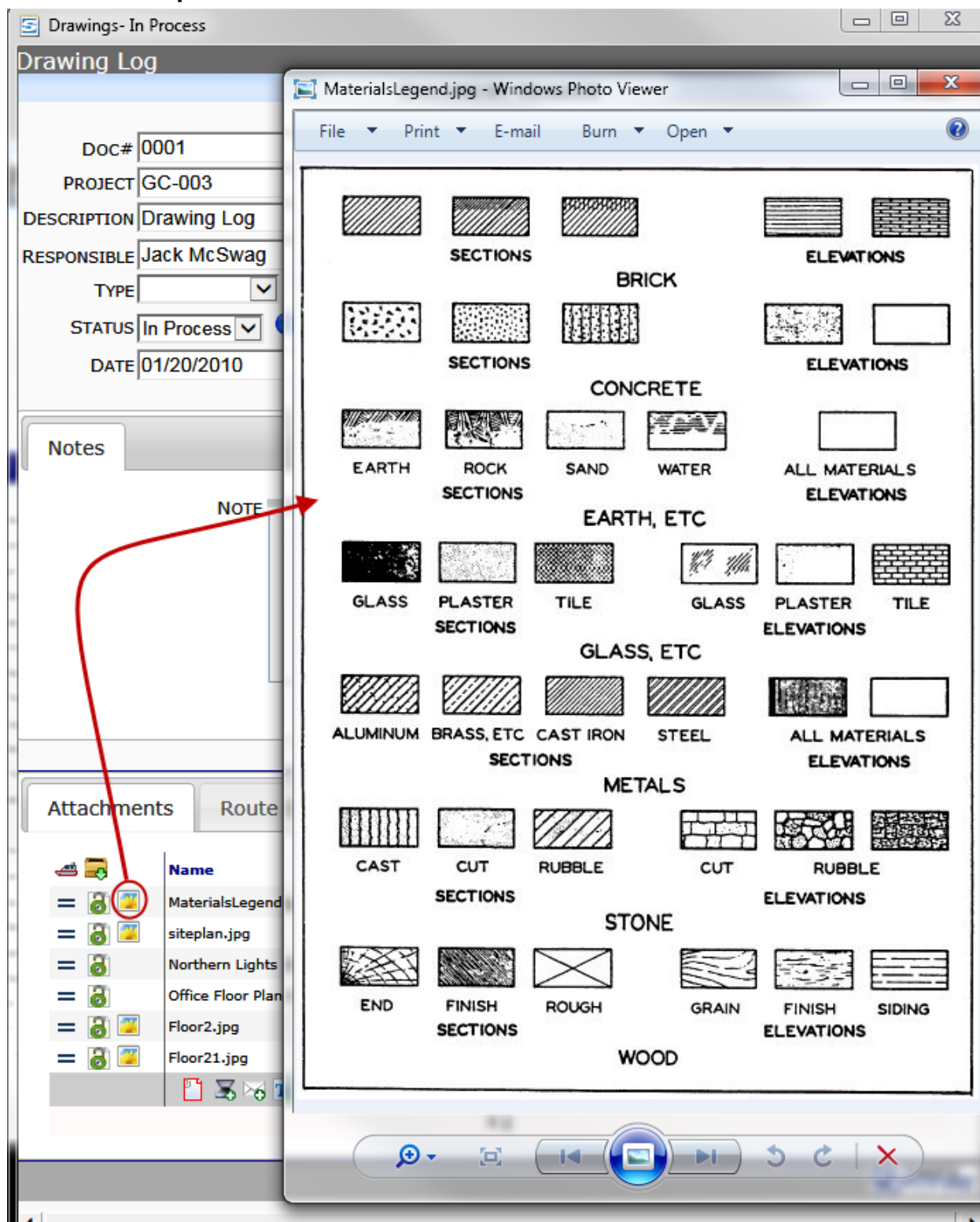
Permits-Open (City Water and Sewer Permit):

- DOC#: 0001
- SOURCE#:
- PROJECT: GC-003
- DESCRIPTION: City Water and Sewer Permit
- STATUS: Open
- DATE: 09/25/2014
- DUE: 10/19/2014
- PERMIT TYPE: Water Supply
- Attachments:

Name	Size	Note	Item	Incl	Seq	Cataloged
City Water and Sewer Permit Receipt	24KB			Not Sent		10/11/2006
Utility Connection Design Change Issue - 0001				n/a - Linked		9/25/2014
City Water and Sewer Permit Application	24KB			Not Sent		10/11/2006

In Example 1, a Permit document has been attached to an Issue document. The Issue document, in turn, has been attached to a Meeting Minute document. This ability to form a document chain is a powerful tool that allows you to track items throughout the life of a project—Meeting Minutes → Issue → Permit.

Example 2



In Example 2, several files have been attached to a Drawings document.

Attachments Tab

Attachments are added and accessed through the Attachments tab that appears on all Spitfire documents:

Field Directive- Field Directive: Review New Drawings

DOCUMENT HEADER

Automatically saved to record new attachment(s)

DOC# 0001

PROJECT GC-003 Northern Lights Office Bldg

DESCRIPTION Field Directive: Review New Drawings

STATUS In Process

DATE 09/13/2014 DUE 09/18/2014

Notes Addr Follow-up Items

DIRECTIVE Please review the two attached drawings and distribute as required. Follow-up on Drawings due by Friday, noon.

RESOLUTION

Added	By	Remark

Attachments Route Detail

Name	Size	Note	Incl	Seq	Cataloged
siteplan.jpg	265KB	Review and Respond	Native	10/5/2006	10/5/2006
SiteUtilities.jpg	191KB	Review and Respond	Native	10/5/2006	10/5/2006
AcmeMeeting.doc	30KB		Native	9/25/2014	9/25/2014
Utility Connection Design Change Issue - 0001			Not Sent	9/25/2014	9/25/2014

Attachments can be both files and Spitfire documents. In this case, the first two are JPG files, the next is a Microsoft Word file, and the last is a Spitfire document (Issue).


Attaching Files, Documents, and Links

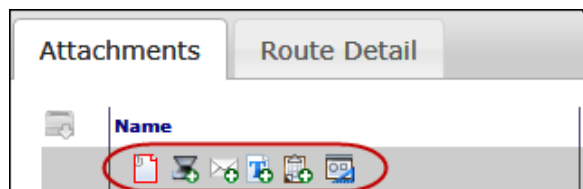
There are several methods for creating an attachment for a document:

- [Drag and drop](#) a file onto the Attachment tab (see page 45).
- [Scan or upload a new file or link](#) (see page 28).
- [Attach a file or document already in the Spitfire Catalog](#) (see page 46).
- [Attach files that are already attached to a Drawings](#) (or other) document (see page 48).
- [Create a file from an Attachment template](#) (see page 51).
- Attach a file [via email from a mobile device](#) (see page 78).

All of these types of attachments can also be [attached to specific Items](#) within the document, as described on page 49.

In addition, there is any easy way to [attach an Issue](#) (or other) document to another document (see page 47).

Note: Before an attachment can be added to a new Spitfire document, you must save the document by clicking  at the Document Header. Once a document has been saved (and if you have the proper permissions), icons appear at the bottom of the Attachments tab:
























New Document after Saving –Icons are now available.

Attachments Tab Columns

Attachments

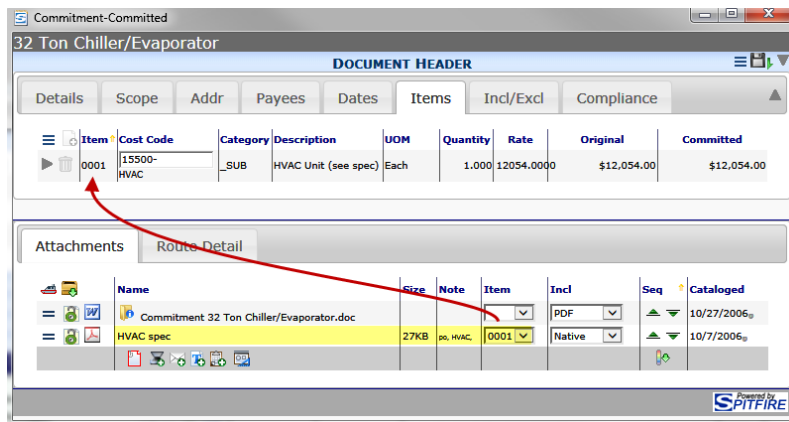
Route Detail

 	Name	Size	Note	Item	Incl	Seq	Cataloged
 	 Commitment 32 Ton Chiller/Evaporator.doc			<input type="text"/>	PDF	 	10/27/2006
  	HVAC spec	27KB	po, HVAC,	<input type="text"/>	Native	 	10/7/2006
      						 	

The Attachments tab lists the files and documents that are attached to the document (and specific Items) and provides the following columns of information for each line item:

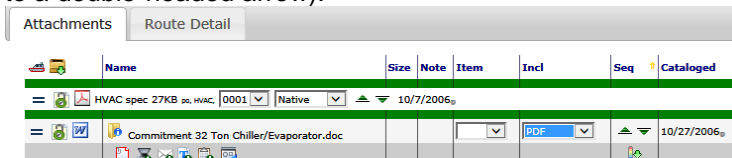
- **Name:** File names (which may include an extension). Document names and corresponding Doc types also appear here.
- **Size:** the size of the file in KB or MB.
- **Note:** The contents of the note field for each attachment. Notes are specified on the [Add Files tool](#) (see page 27) or the [Properties window](#) (see page 58). System notes, such as “Auto Attached” may also appear here.


- **Item:** The number of the Item if a file/document is attached to a particular document Item. For example, in the Commitment document shown on the next page, Floor2.jpg is actually attached to Item # 0001 on the Items tab. ([See also page 49](#)):





Note: the Item column is hidden if there are no Items on the document.

- **Incl:** the include status of the attached file/document. Possible options indicate if and how the file will be included in routed emails, faxes and hard copy output.
 - **Assemble** means to include this file in one merged PDF file (along with all other Assembled files).
 - **Native** means to include this file in its native format (for example, as a DOCX or PNG file).
 - **Not Sent** means to not include the file when it is routed via email or fax.
 - **PDF** means to convert the file (if possible) to a PDF file.
 - **n/a – Linked** (which is a read-only option) means a document that is attached because the current document is also attached to it (reciprocally).
- **Seq:** a way to change the order of included files. Files are assembled in the order they appear on the list. There are three ways to change the order of rows in the Attachment tab.
 - Use the mouse to drag-and-drop a row up or down. Grab the row in the first column (you'll see the cursor change to a double-headed arrow).



After you move all the rows you want to move, click  to save the document and keep the new sequence.

- Click  or  to move a file up or down in the list.

TIP

For more information about print formats for Spitfire documents, see "What Gets Routed" in the [Focus on Routes](#) guide.


TIP


If a file is too large, its **Incl** status will default to Never, because it cannot be emailed.



TIP

Attached documents can be set to **Not Sent**, **PDF** or **Assembled**. What gets sent is that document's assembled output excluding its nested documents.

TIP

If you have more than one page of files and want to drag and drop to reorder, first click the number for page 2, then click the icon that appears .

- Click  to toggle the Seq column and display numeric fields, in which you can indicate new numbers for the files you want to move up or down.


Attachments		Route Detail				
	Name	Size	Note	Item	Incl	Seq
	Commitment 32 Ton Chiller/Evaporator.doc				PDF	20
	HVAC spec	27KB	ps, HVAC	0001	PDF	40

- Cataloged:** The date the file was cataloged (i.e., added to the Spitfire Catalog).

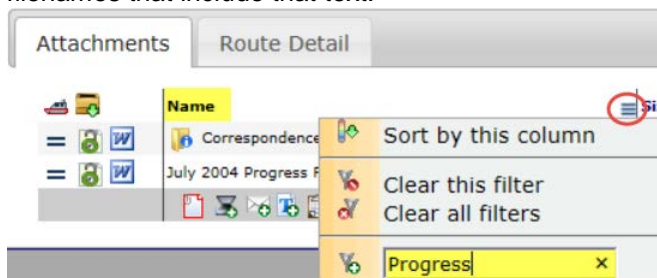
Attachments Tab Filters*

TIP

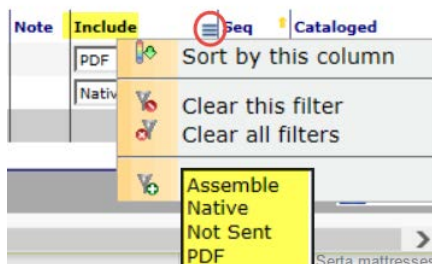
To remove filters, open the in-column drop-down menu again and select **Clear this filter** or **Clear all filters**.

The **Name**, **Include**, and **Cataloged** columns offer a drop-down menu when you click anywhere on the header. A  icon will appear.

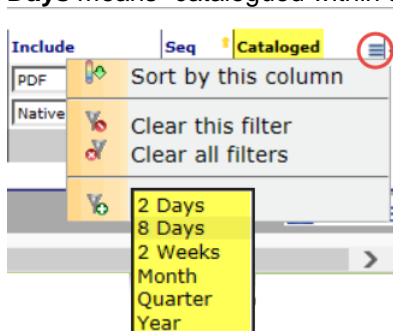
- Name:** Type some text. The Attachments list will be filtered by filenames that include that text.



- Include:** Select a choice from the drop-down menu. The Attachments list will be filtered by that Include choice.



- Cataloged:** Select a time period from the drop-down menu. The Attachments list will be filtered by that period. For example, **8 Days** means “catalogued within the past 8 days.”



Drag and Drop

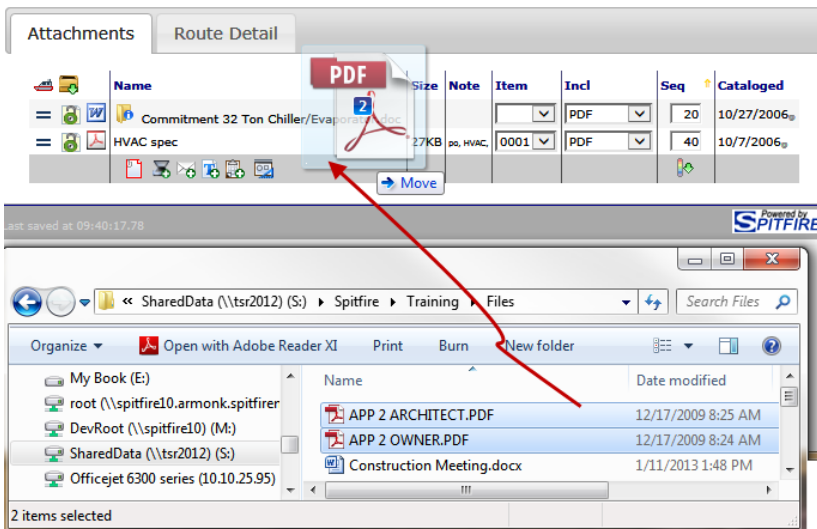
The easiest way to attach a file to a document is through drag and drop.

To attach a file through drag and drop:

1. Select the Attachments tab on a document.
2. Find the file(s) you want on your computer.
3. Highlight the file(s) and drag them to the Attachment tab.
4. Release the mouse button.

Tip

The text that says **Move** is misleading; the file is copied, not moved, from its original location. In Google Chrome, it says **Copy**; in Microsoft IE, it says **Move**, but in both cases, the file is copied.



Attachments		Route Detail					
	Name	Size	Note	Item	Incl	Seq	
	Commitment 32 Ton Chiller/Evaporator.doc					20	10/27/2006
	HVAC spec	27KB	po, HVAC	0001	PDF	40	10/7/2006
	APP 2 OWNER.PDF - 0003	66KB			PDF	60	
	APP 2 ARCHITECT.PDF - 0003	65KB			PDF	80	

Note: If you drag and drop a file that has the same name as a file that already exists in the Catalog, the Catalog will treat it as a newer version of the file. (See also the next section.)

Adding a File That Already Exists in the Catalog

TIP

If you use similar Customer, Vendor and Employee IDs, you should use different catalog folders to store files that are attached to your Customer, Vendor and Employee documents so as to prevent confusion over files that have the same name but are different files.

When you use the Add Files tool to attach a new version a file to a document, the Add Files tool acts like the [Check-In feature](#) (see page 64), adding a new version of the file to the Catalog. In order for this to work, the filename (Name), Project, Folder and Source Contact (if any) of the new version must match the existing information of the file already in the Catalog,

For example, if Project GC-003 already has AcmeMeeting.doc in the General folder, and you upload AcmeMeeting.doc again in the General folder of Project GC-003, both versions of the file will be kept in the Catalog, the one you just added being the “latest version.” (On the other hand, if you add another file called AcmeMeeting.doc for a different project, both files will appear in the Catalog as distinct files.)

For more on [file versions](#), see page 67.

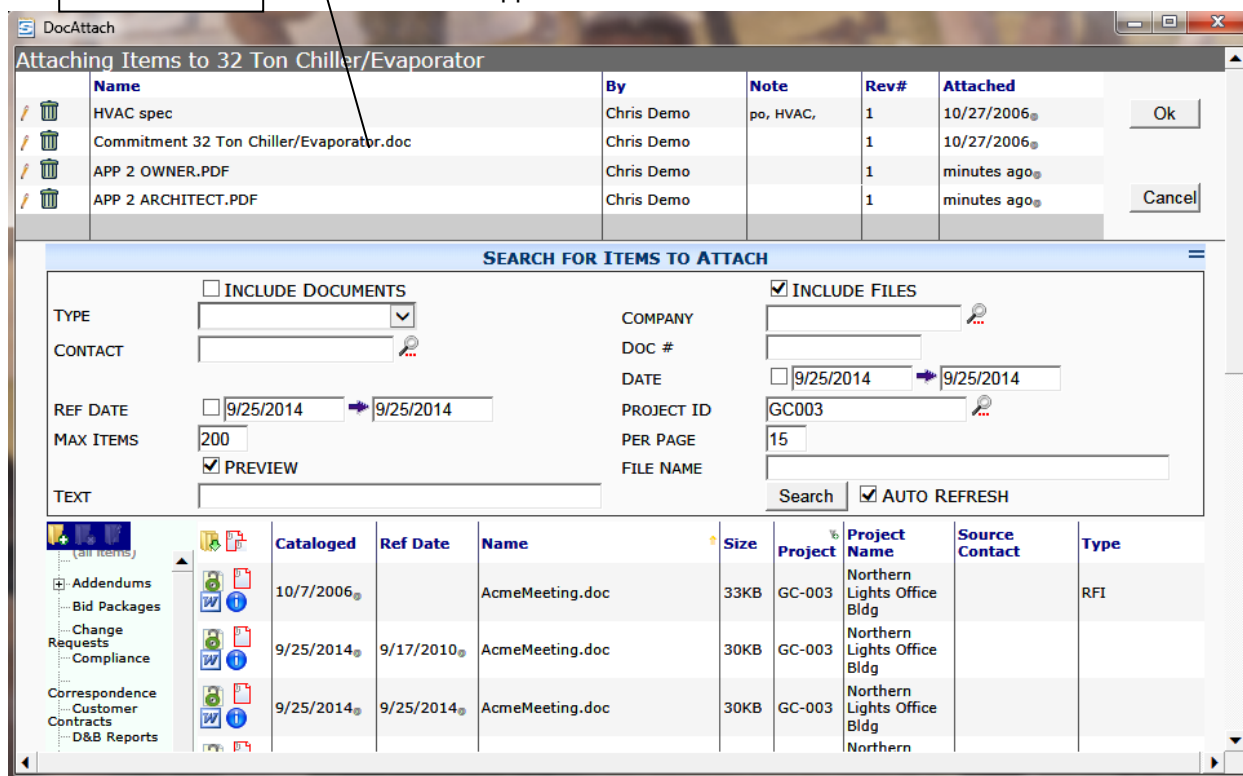
Attachments from Spitfire Catalog

Both files and documents that are part of the Spitfire Catalog can be attached to a particular document through the **DocAttach** window.

To attach a Catalog file or document to your document:

1. At the Attachments tab, click . The DocAttach window will appear.

If there are attachments for the document already, they are listed on top.



DocAttach
Attaching Items to 32 Ton Chiller/Evaporator

Name	By	Note	Rev#	Attached
HVAC spec	Chris Demo	po, HVAC,	1	10/27/2006
Commitment 32 Ton Chiller/Evaporator.doc	Chris Demo		1	10/27/2006
APP 2 OWNER.PDF	Chris Demo		1	minutes ago
APP 2 ARCHITECT.PDF	Chris Demo		1	minutes ago

SEARCH FOR ITEMS TO ATTACH

☐ INCLUDE DOCUMENTS ☒ INCLUDE FILES

TYPE: COMPANY:

CONTACT: DOC #:

REF DATE: DATE: PROJECT ID:

MAX ITEMS: PER PAGE:



TEXT: FILE NAME:

☒ PREVIEW ☒ AUTO REFRESH

Cataloged	Ref Date	Name	Size	Project	Project Name	Source Contact	Type
10/7/2006		AcmeMeeting.doc	33KB	GC-003	Northern Lights Office Bldg		RFI
9/25/2014	9/17/2010	AcmeMeeting.doc	30KB	GC-003	Northern Lights Office Bldg		
9/25/2014	9/25/2014	AcmeMeeting.doc	30KB	GC-003	Northern Lights Office Bldg		


- Use the filters (and/or use the folder tree) to find the documents and files that you want to attach to your document. The files on your project will be listed by default.


Note: the filters are the same as those that appear on the Catalog dashboard and the resulting document and files lists are similar. (For more information on the [Catalog Dashboard](#) see page 10.)

- Either click  at the line item of each document(s) or file(s) that you want to attach or click  to attach all files/documents currently listed.

Attach all

Attach this one

Click  to edit the line item (e.g. to add a Note).

Click  to un-attach a file or document. You will not be removing it from the Catalog.

	Cataloged	Ref Date	Name
	10/7/2006		AcmeMeeting.doc

The selected attachments will appear on the list at the top of the window:

Name	By	Note	Rev#	Attached	
HVAC spec	Chris Demo	po, HVAC,	1	10/27/2006	
Commitment 32 Ton Chiller/Evaporator.doc	Chris Demo		1	10/27/2006	
APP 2 OWNER.PDF	Chris Demo		1	9/25/2014	
APP 2 ARCHITECT.PDF	Chris Demo		1	9/25/2014	
AcmeMeeting.doc	Chris Demo		3	9/25/2014	

- When you have attached the files and documents you want, click

Ok

. Your attachments will now appear at the grid of the Attachment tab.

Note: documents are saved automatically when you add attachments.


Issue Documents


Tip

Issue documents must already exist before they can be attached.




See the [Focus on Doc Types and Project Workflow](#) guide.

Tip

The  icon can be set up to filter by a Doc type other than Issue through the **DocTypeConfig | ExpressDocAttach** rule.

The  icon on a Bid Package document finds Invitation to Bid documents. For more information, see [KBA-01154](#).

To attach an Issue document to a related document:

- At the document to which you want to attach an Issue, click , The DocAttach window will appear with possible Issue documents listed.
- Click  at the Issue that you want attached to your document. (You can attach more than one issue.) The Issue will be listed at top.
- When all the Issues you want to attach are listed at the top, click . The Issue(s) will appear on the document's Attachment tab.

Note: when you attach an Issue to a document, that document is also attached to the Issue. When you open the Issue document, therefore, you can quickly see which documents pertain to that project issue:

The screenshot shows a software window titled 'Issue-In Process-GC' with a sub-header 'Utility Connection Design Change'. Below this is a 'DOCUMENT HEADER' section containing the following fields:

- DOC#: 0001
- PROJECT: GC-003 (with a link to 'Northern Lights Office Bldg')
- DESCRIPTION: Utility Connection Design Change
- STATUS: In Process-GC (with an information icon)
- DATE: 09/25/2014 (with a calendar icon)

Below the header is a tabbed interface with 'Attachments' and 'Route Detail' tabs. The 'Attachments' tab is active, displaying a table of document attachments:

	Name	Size	Note	Item	Incl	Seq	Cataloged
	City Water and Sewer Permit				Not Sent		9/25/2014
	Permits - 0001				n/a - Linked		1/9/2010
	Weekly meeting 17				Not Sent		10/5/2006
	Meeting Minutes - 0017				n/a - Linked		9/22/2014
	SiteUtilities.jpg	191KB			n/a - Linked		9/25/2014
	Change Order 0001				n/a - Linked		9/13/2014
	Change Order - 0001				n/a - Linked		
	Changed Lateral Size and Spec's				n/a - Linked		
	RFI - 1001				n/a - Linked		
	Field Directive: Review New Drawings				n/a - Linked		
	Field Directive - 0001				n/a - Linked		

At the bottom right of the window, it says 'Powered by SPITFIRE'.

Files on Drawings Documents

If you have files attached to Drawings documents (drawing logs), you can easily attach those files to another document.

TIP

The icon can be set up to filter by a Doc type other than Drawings through the DocTypeConfig | ExpressDocAttachFiles rule. For more information, see [KBA-01154](#).

To attach files that are on a Drawings document (drawing log):

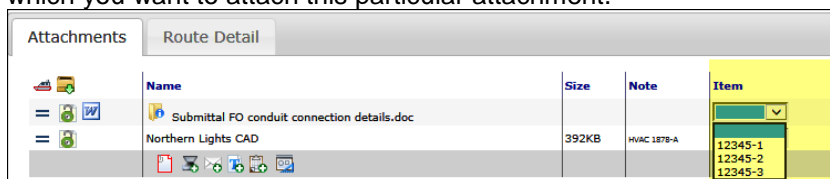
1. At the document to which you want to attach drawing log files, click . The DocAttach window will appear with Drawings documents listed.
2. Click at the Drawings document that holds the files you want to attach to your document. (You can attach files from more than one Drawings document.) All files from the Drawing document(s) will be listed at top.
3. Review each file listed at top. If there is any file that you do not want to attach, click on that row to remove the file from the attachment list. (You will **not** be deleting the file from the Catalog.)
4. When all the drawing files you want to attach are listed at the top, click . The file(s) will appear on the document's Attachment tab.


Item Attachments

There are two ways to attach a file or document to a specific Item.

To attach a file or document to a specific Item when starting with the attachment:

1. Go to the row of the attachment that you want to attach to a specific Item
Note: the Item must have been saved on the document first.
2. On the Item drop-down, select the Item (by Item number) to which you want to attach this particular attachment.






3. Click  to save the change. The attachment row will now indicate the Item to which it is specifically attached.

Tip

Users who do not have access to a particular Item also do not have access to files/documents attached to that Item.

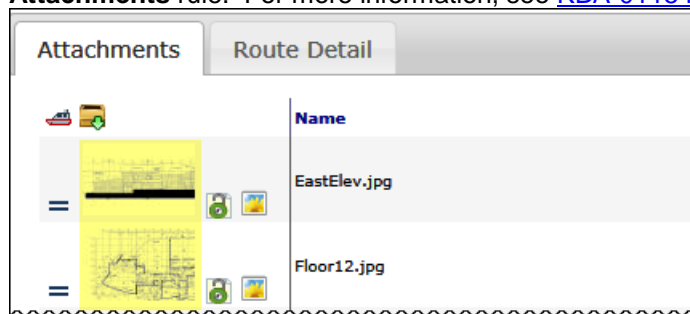
To attach a file or document to a specific Item when starting with the Item:

- Click  to get to the Item's Detail view. While the Item is thus expanded,
 - drag and drop a file onto the Attachment tab ([see page 45](#)), or
 - click  to scan or upload a file ([see page 28](#)) or
 - click  to attach a file from the Catalog ([see page 46](#)).

Your attachment will be specifically attached to the Item.

Optional Thumbnails

Your documents can be configured to show thumbnails of attached files on the Attachments grid through the **DocTypeConfig | Preview Attachments** rule. For more information, see [KBA-01154](#).



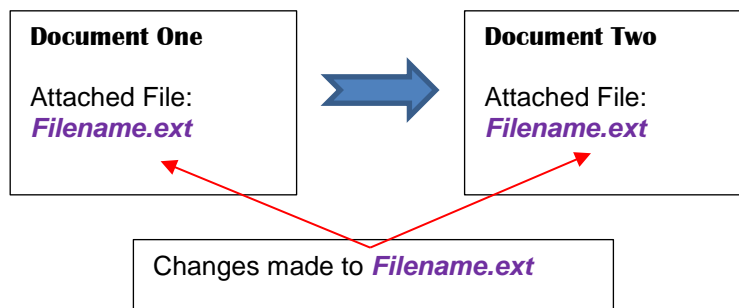
Attachment Cloning*

Normally, when you copy a document and its attachments, the attached file on the copied document is the same file as the original. If changes are made to the file in the first document, those changes are seen when the file is opened from the second document, because it is the same file.

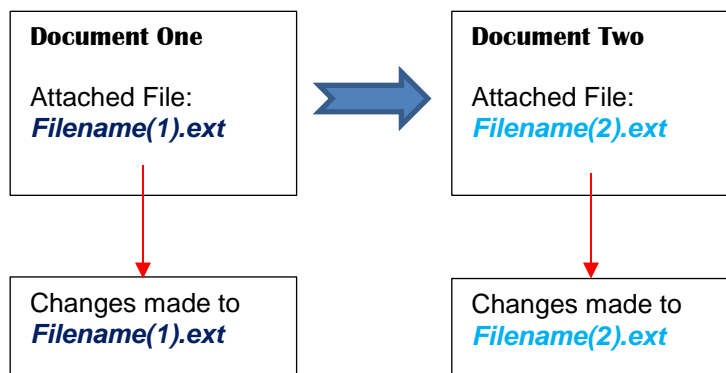
There may be times when you actually want to copy a file and end up with two files that are identical to begin with, but can be edited independently. For example, you may want to start each Meeting Minutes document with a copy of last week's agenda, but then make changes to the new agenda without affecting last week's agenda.

Note: cloned files must start with a file that is created from an Attachment template.

Copied Document with Attached File



Copied Document with Cloned File



Setup

sfPMS knows which files to copy and which to clone based on certain **DocCopyConfig** rules, namely **AttachedTemplates**, **AttachmentCloning**, and **AttachmentFilter**, configured for specific Doc types. See [KBA-01530](#) for more information.

Attached File from Template Feature

It is possible to use merge and non-merge Attachment templates to create files that are then attached to the document and included, if appropriate, in the output that gets routed. (Merge templates use bookmarks to merge data from Spitfire onto the file.) Templates are added through the Templates tool on the Manage and System Admin Dashboards.

For information about the Templates tool, see the [Focus on the Manage Dashboard](#) guide.

Attachment (auto) and (all)


Attachment (auto)



A document can have one and only file created from an **Attachment (auto)** template.

sfPMS creates a file from an **Attachment (auto)** template only if

- the document has no [manually created file](#) from a template (see page 52) and
- only one Attachment (auto) template criteria matches the document.
For example, if there are two Attachment (auto) templates for Daily Field Reports without other criteria, neither will be used. However, if other criteria (such as Sub type or Customer) make the template unique, the template that matches the criteria of the document will be used.

sfPMS creates a file from an Attachment (auto) template when

- the document leaves Seq. 1 of the route (i.e., when the document is first routed) or
- the [preview routed content](#) icon () is clicked for a routee (see page 53).

Attachments		Route Detail	
		Seq	To
		1	Chris Demo (Superintendent)
		2	Blue Air Recycling Blue Air Recycling

(See the Note on the next page.)


Attachment (all)



A document can have any number of files created from **Attachment (all)** templates.

sfPMS creates a file from an Attachment (all) template only if

- the document has no [manually created file](#) from a template (see page 52).


sfPMS creates files from Attachment (all) templates when

- the document leaves Seq 1 of the route (i.e., when the document is first routed) or
- the [preview routed content](#) icon () is clicked for a routee (see page 53).

Attachments		Route Detail	
		Seq	To
		1	Chris Demo (Superintendent)
		2	Blue Air Recycling Blue Air Recycling

Note: If a file will be created when the document is routed (or content is previewed), the message “**One or more Attachments will be created from templates when this document is routed**” appears on the Attachments tab when the document is saved.

Create from Attachment

If a Doc Type has at least one Attachment template (in the template library), the  icon appears on that document's Attachment tab. The icon allows you to manually create a file from a template as necessary.


The icon indicates that an Attachment template is available. You can choose to generate a file from that template at any time while the document is in an open status. The generated file will be automatically attached to the document (and thus also added to the Catalog). The file can be treated as any other file (i.e., edited, routed and included in assembled output as appropriate).

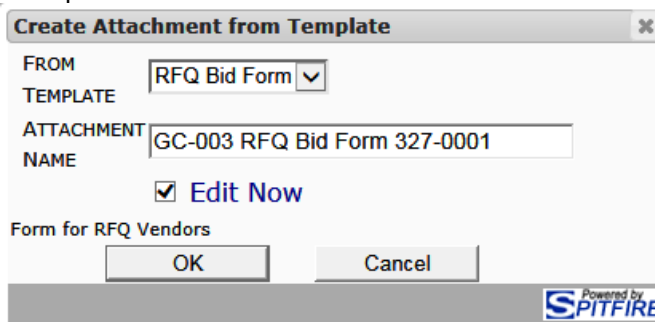
TIP

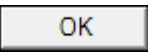
A special kind of file can be created from an Excel template to add Items to your document. See the “Items from Attached Via Excel Files” section in the [Focus on Document and Item Basics](#) guide for more information.

Note: **PDF**, Microsoft Excel and Microsoft Word files can all be created from Attachment templates. Only Word templates, however, allow for merged data.

To generate a file from an Attachment template:

1. Click  on the Attachments tab. A dialog box will appear, for example:


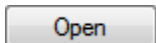


2. (optional) If the template that you want to use is not the one listed in the **From Template** field, select another from the drop-down.
Note: Attachment templates, including Attachment (auto) templates, which are available for the particular Doc type appear as choices. Attachment (all) templates are not included.
3. (optional) In the **Attachment Name field**, type a name for the file you are creating, if you do not like the default. The default name is taken from the template.
4. (optional) If you do not want to edit the new file at the moment, click the **Edit Now** checkbox to uncheck it. If you choose to edit the file at a later time, the newly created and attached file will be identical to the template for the time being.
(For more information on how [to edit a file](#), see page 65.)
5. Click . If the **Edit Now** checkbox was checked, the newly created file will open.
 - o Edit the file and then save it.
 - o Close the file.
6. You can review/open the file from the Attachments tab, where the file is now listed.

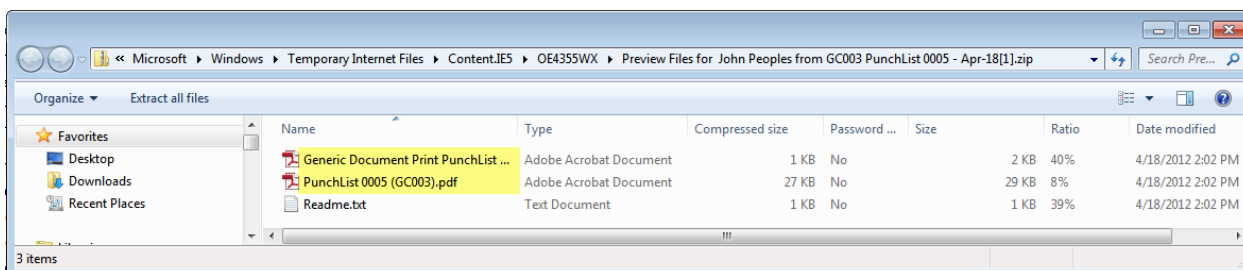
Viewing the Files

You can view a file created from an Attachment, Attachment (auto), or Attachment (all) template by viewing the file as normal from the Attachments tab.

To preview files created from templates

1. Add at least one routee to the document, as usual.
2. Save the document.
3. Click . A message will appear while sfPMS gathers and assembles files.
4. When the File Download dialog box appears, click . You may need to click the button twice.

- On the Windows Explorer window, find the files you want to view, for example:



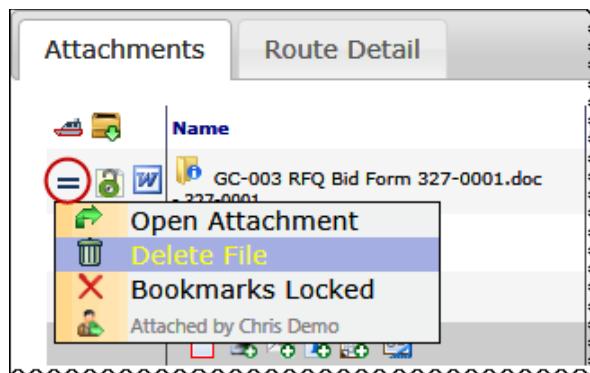
- Back on your Spitfire document, click where it says **Click here after the download**.

For instructions on how to [view the file](#) from the Attachments tab, see page 63.




Attachment Options

Deletion of Files Created through Attachment Templates

If the document has not yet been routed, you can delete a file that was created from an Attachment, Attachment (auto), or Attachment (all) template (unless the file is also attached to another document). Deleting the file means removing it from the document as well as the Spitfire Catalog.

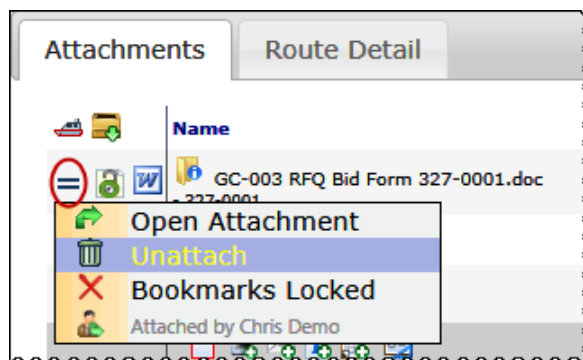


To remove a file from the document:




- Click  to open the Options menu for the file you want to remove from the document.
- Select  **Delete File**.
- Click  to save the document.

Unattachment of Files Created through Attachment Templates

After the document has been routed, a file created from an Attachment, Attachment (auto) or Attachment (all) template can no longer be deleted. However, such a file can be unattached from the document. Unattached files remain in the Spitfire Catalog and also in the routed content that was already routed to someone.

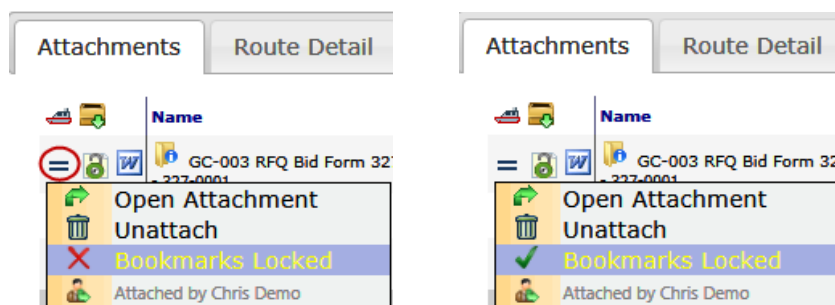


To remove a file from the document:


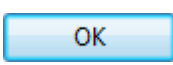
1. Click  to open the Options menu for the file you want to remove from the document.
2. Select  **Unattach**.
3. Click  to save the document.

Locked Bookmarks



By default, sfPMS updates the bookmarks in a file created from a bookmark template each time the document is opened. The Bookmarks Locked toggle can be turned on to indicate that bookmarks should not be refreshed until such time as the Bookmarks Locked option is turned off again.

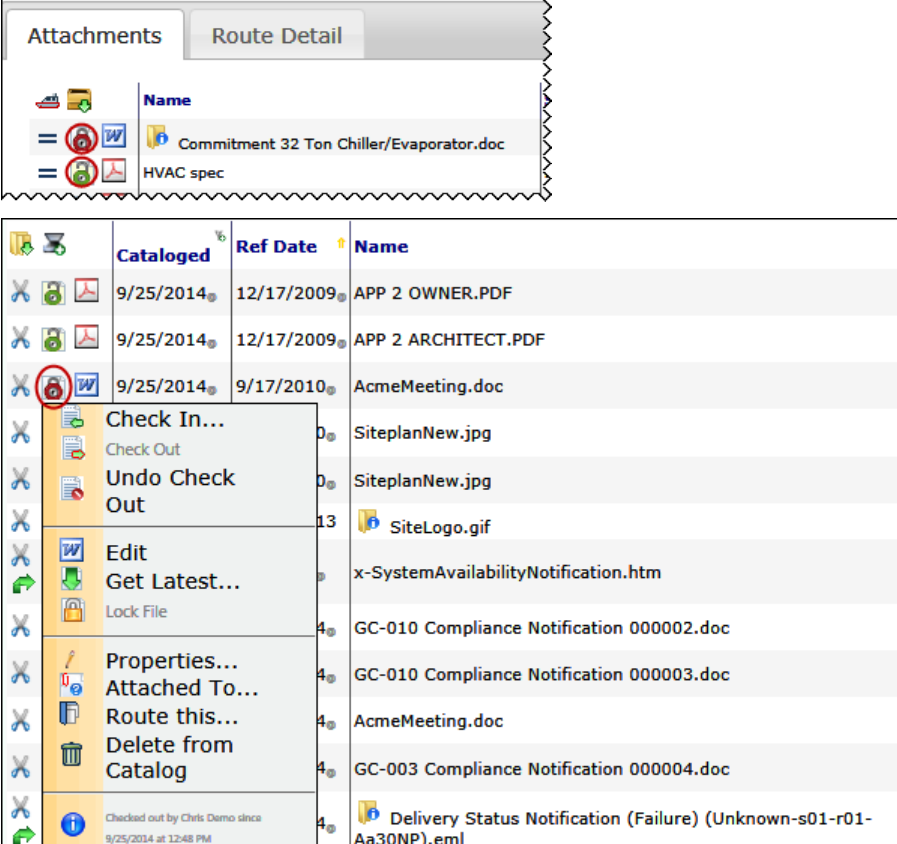


To lock down the bookmarks in a merge template:

1. Click  to open the Options menu for the file on which you want to lock the bookmarks.
2. Select **Bookmarks Locked**.
3. Click  at the confirmation box that appears.

File Options

Wherever you find files (on the Attachment tab, the Catalog or the Project Dashboard), you will find the  or  icon on each file row. The icons tell you whether a file is “checked in” or “checked out/locked” ([explained on page 64](#)). They also open a drop-down File Options menu. Using the options on this menu, you can perform various tasks with your files.



The screenshot shows the 'Attachments' tab selected. Below it, a table lists files with their status icons. The file 'AcmeMeeting.doc' is highlighted, and its context menu is open. The menu options are:

- Check In...
- Check Out
- Undo Check Out
- Edit
- Get Latest...
- Lock File
- Properties...
- Attached To...
- Route this...
- Delete from Catalog

The status bar at the bottom of the menu indicates: 'Checked out by Chris Demo since 9/25/2014 at 12:48 PM'.



Check In/Check Out

You can choose to manually [check out and check in a file](#) from the File Options menu. For more information, see page 64.

Get Latest

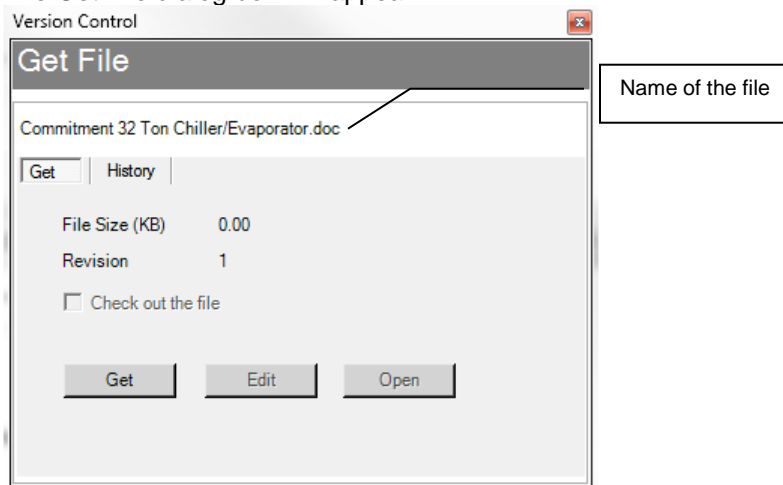
sfPMS can contain various versions of the files in your system. There may be times when you want to get a copy of the latest version of a file to place on your computer. You can copy the version of the file to your computer through the **Get Latest** option. If, however, you plan on making changes to the file and uploading your changed file back to sfPMS, you should [edit the file](#) instead, as described on page 65.

To get a copy of a file for your computer/network:

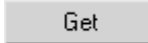
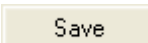
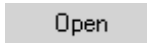

1. Click either  or  at the row of the file you want to copy. The File Options menu will open.

2. Select  **Get Latest.**

The Get File dialog box will appear:



Note: the Get File dialog box allows you to check out the file. (See page 64 for more information about [checking out a file](#).) The Get File dialog box also allows you to [edit a file](#). (See page 65 for more information about editing a file.)

3. Click . A browser window will appear.
4. Navigate to a location on your computer or network where you'd like to save the copy of this file then click .
5. (optional) If you want to open the copied file, click  back at the Get File box. The file will open in its native application.
Note: You do not need to open the file at this point. Because the file is on your computer/network, you can open the file in its native application (outside of sfPMS) at any time using traditional means.
6. Click  to close the Get File box.

TIP

Once you copy a file, that copy loses all connection to sfPMS. You can do whatever you want to the file on your computer independent of the file that still remains in sfPMS. But if your intention is [to edit the file](#), see page 65.

View Latest

If you have read/view access to a file, you can choose to view the latest version of that file from the File Options menu. For more information, [see page 63](#).



Edit


If you have edit permission for a file, you can choose to edit that file from the File Options menu. For more information, [see page 65](#).




Lock/Unlock File

A file can be “locked” so that no user can edit the file. A file would need to be unlocked again before anyone could edit or check the file out. After a file has gone through all its revisions, it should be locked.




To lock a file:

1. Click  on the line item of the file you want to lock.
2. From the File Options menu, select  **Lock File**.

The icon on the row will change to  to indicate the locked file:

	Cataloged	Ref Date	Name
	10/7/2006		AcmeMeeting.doc
	10/11/2006		AGC450DB



To unlock a file:

- Click  on the row of the file you want to unlock then, from the File Options menu, select  **Unlock**. The icon for the file will change back to .

Properties...

Depending on your permission level, you can view or edit additional information (properties) about each file. Properties give you more ways in which to search for the file.

To open the File Property Editor window:

- Click  to open the File Options menu for the file you want, then select  **Properties**. A File Property Editor dialog box will appear.

TIP

The **Is Confidential** checkbox on the File Properties tab makes the file “confidential.” This means that only people who get the file routed to them (through a Spitfire document) will be able to view it. Files attached to documents that are designated as “confidential” automatically get this checkbox checked.

File Properties Tab

On this tab, you can view or enter information that may be useful when using the filters to conduct a file search, for example:

File Property Editor - AcmeMeeting.doc

FILE PROPERTIES

File Properties | File Version | Access History

SOURCE DOCUMENT

NAME: AcmeMeeting.doc

Doc #:

LATEST REV #:

BATCH #:

TYPE: RFI

NOTE: Acme meeting minutes regarding funds allocation

OTHER:

CATALOG FOLDER:

PROJECT: GC-003

REFERENCE DATE:

SOURCE CONTACT:

OTHER CONTACT:

IS CONFIDENTIAL: ☐

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Notes that you enter here appear on the Attachment tab when you attach this file to a document. This note also appears on the optional Notes column on the Catalog or Project Dashboard Files list.

SEARCH

☐ INCLUDE DOCUMENTS

TYPE:

CONTACT:

REF DATE: 9/25/2014 → 9/25/2014

MAX ITEMS: 200

☐ PREVIEW

TEXT:

☒ INCLUDE FILES

COMPANY:

DOC #:



DATE: ☒ 09/24/2013 → 09/25/2014

PROJECT ID:

PER PAGE: 16

FILE NAME:

Search ☒ AUTO REFRESH

- Click  to save your changes, if any and click  to close the dialog box.




Other

In addition, if you configure the Catalog Dashboard to include the Other column, information from the Other field will be listed on the file list.

TYPE: Commitment

NOTE:

OTHER: This file also uses the Other field.

	Cataloged	Ref Date	Name	Size	Project Name	Other	Source Contact
	1/1/2015	1/1/2015	CloudFolderLinkInfo.htm	< 1KB			Spitfire
	12/17/2015	12/17/2015	GC-003 Compliance Notification 000002.doc	31KB	Northern Lights Office Bldg	Any kind of note	Universal HVAC Specialties
	12/17/2015	12/17/2015	GC-003 PO 0003.doc	40KB	Northern Lights Office Bldg	This file also uses the Other field.	Universal HVAC Specialties

File Version Tab

On this tab, you can access and view information about [all versions of the file](#). See page 67 for more information.

Access History Tab



On this tab, you can see who has accessed the file and when.

Rev#	Accessed	By	Reason	Context	In Cache
1	minutes ago	Chris Demo	Read	32 Ton Chiller/Evaporator (GC003, #0003)	✓
1	Dec 17, 2015 09:19	Chris Demo	Attached	32 Ton Chiller/Evaporator (GC003, #0003)	✗
1	Dec 17, 2015 09:19	Chris Demo	Saved Version	32 Ton Chiller/Evaporator (GC003, #0003)	✗

Attached To...

Since files can be attached to documents, you might want to see to which documents a file is attached.

To see what documents have a particular file as an attachment:

1. Click  to open the File Options menu for the file you want, then select  **Attached To**. A list of documents that have the file as an attachment will appear, for example:

Date	Title	Type	DocNo	Project	Project Name	Source Contact	Status
9/13/2014	Field Directive: Review New Drawings	Field Directive	0001	GC-003	Northern Lights Office Bldg	Wilma Flint	In Process

2. Click  to close the window.



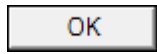
Route This...



TIP

You can also route a file (through the Catalog File Route document) from [the Add File tool](#). See page 37.

Many Spitfire documents are routed with attached files that support the purpose of the document. However, you might sometimes want to route a file for its own purposes. In such situations, you can route the file through a special **Catalog File Route** document, which exists just for routing purposes.

To route a file from the file list:



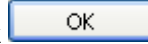

1. Click  to open the File Options menu for the file you want, then select  **Route this**.
2. Click  at the confirmation box that appears.
3. The Catalog File Route document window will appear. This special document will have the file as an attachment, for example:

4. Click the Route Detail tab to add routes to your route.
5. Click  to send the document (and your file) on it route.
6. Click  to close the document window.

Delete from Catalog

The option to delete a file from the catalog appears only for users who have the proper permission. Since deleting a file cannot be undone, *use this option with extreme caution.*

To delete a file:

1. Click  to open the File Options menu for the file you want to delete, then select  **Delete From Catalog**.
2. If you really want to delete the file, click  at the warning box that appears.
3. Click  at the top of the Catalog dashboard in order to make your deletions permanent.

Renaming a File*

In-place editing allows you to edit a file's name easily from various locations.

- The Name column of the File part of the Catalog Dashboard:

The screenshot shows the Catalog Dashboard with the following elements:

- Navigation tabs: Home (3), Catalog, Contacts, Plan Room, Executive, Manage, S.
- Form fields: TYPE (dropdown), CONTACT (text), DATE (calendar), PROJECT ID (text), PER PAGE (text), TEXT (text), INCLUDE DOCUMENTS (checkbox), COMPANY (text), DOC # (text), REF DATE (text), MAX ITEMS (text), FILE NAME (text).
- Table with columns: Cataloged, Ref Date, Name.

Cataloged	Ref Date	Name
1/1/2015	1/1/2015	CloudFolderLinkInfo.htm
12/17/2015	12/17/2015	GC-003 Compliance Notification 000002.doc
12/17/2015	12/17/2015	GC-003 PO 0003.doc

- The Name column of the File part of the Project Dashboard:

The screenshot shows the Project Dashboard with the following elements:

- Navigation tabs: Projects, Plan Room, Executive, Manage, System Admin, GC-010, GC-003.
- Section: Office Bldg.
- Section: BUDGET - 1 OPEN DOCUMENTS; ALL DUE TH.
- Section: TEAM CONTACTS.
- Section: KEY PERFORMANCE INDICATORS.
- Section: COST ANALYSIS DETAIL.
- Section: FILES.
- Table with columns: Cataloged, Ref Date, Name, Size.

Cataloged	Ref Date	Name	Size
10/7/2006		AcmeMeeting.doc	33KB
10/11/2006		AGC450DB	115KB
10/5/2006		Certificate Insurance	2.0MB

- The Name column of the document's Attachment tab:

The screenshot shows the Attachment tab with the following elements:

- Navigation tabs: Attachments, Route Detail.
- Table with columns: Name, Size.

Name	Size
gc003-ab0101	68KB
Certificate Insurance	2.0MB
AGC450DB	115KB

Renaming a file in any of these locations will change the name in all of these locations.


To rename a file within Spitfire:









1. Mouse over the filename. The cursor will change, showing a little arrow.
2. Click your mouse. The filename will appear within an editable field.
3. Change the filename.
4. When you press <Enter>, the field will disappear and the file will have its new name. There is no need to save; the filename will stay changed.

Viewing a File

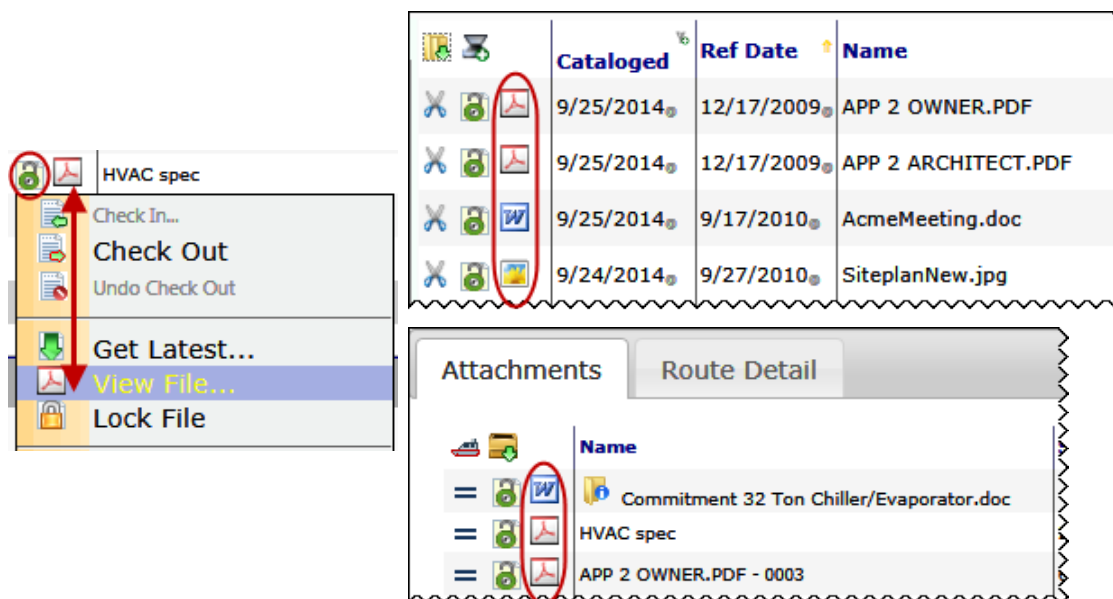
How and if you can view a file depends on several factors:

- If you have permission to view the file through your Spitfire role.
- If a view icon has been established for the file type.
- If you have the means (software) to view the file on your workstation. (In other words, would you be able to view the file outside of Spitfire?)

If there is another way for you to view a file, an icon will appear to the right of the  icon. This icon could look like

-  (default for Adobe Reader)
-  (default for Microsoft Word)
-  (default for Microsoft Excel)
-  (default for Microsoft Project)
-  (default for Microsoft Outlook)
-  (default for image files)
-  (default for .eml files)
-  (default for other file types)

These icons can appear wherever files are listed. The icons are also available from the File Options menu, where applicable. Click the icon to view the file.





To view a file:

- Click the appropriate icon on the file row. The file will open in the appropriate application.

File Revisions

sfPMS is a file management system. This means that you can store all project- and business- related files within the system (instead of having them on different user workstations). Because files may need to be revised over time, sfPMS allows you to edit certain files and then keeps all versions of the files for proper record keeping. The file revision workflow consists of checking the file out, making changes to the file, saving those changes, checking the file back in, and optionally, approving the file.

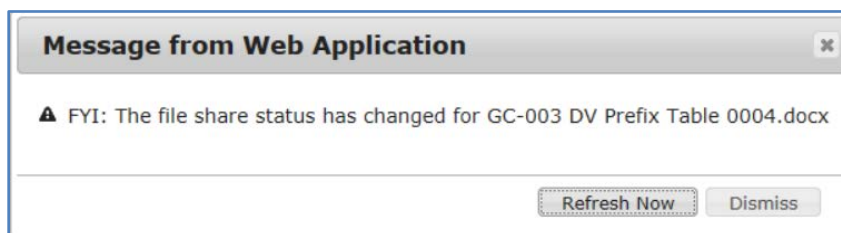
Check-Out and Check-In Concepts



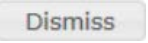
Because various users can access files in sfPMS at the same time, the check-out/check-in feature exists to minimize overriding or conflicting edits. When you check out a file, sfPMS prevents anyone else from also checking the file out. You can then make changes to your file knowing that you started with the latest version, that no one else is simultaneously making changes to the same file, and that your revised file will become the new “latest” version when you check the file back in. While the file is checked out, the “red locked” icon () alerts others that the file is being worked on. Your co-workers can still view a read-only version of the unrevised file while you have the file checked out, but they will know that an update is coming. Furthermore, sfPMS will expect a new version of the file. When you are finished with your edits, you will check in the file. The checked in file becomes the latest version in sfPMS. The “green unlocked” icon () indicates that the file is checked in and available for check out.

Check-Out/Check-In Status Change*

When you open a document with an attached file, it is possible that someone else checks out that file while you are working on the document. Conversely, you might notice that the attached file is checked out, but you want to know when it is available (checked in) again.

When the check-out/check-in status of an attached file changes, a pop-up message appears on the document, for example:





- Click  to refresh your document (as if clicking ) and close the pop-up message.
- Click  to close the pop-up message while leaving your document alone.

Check Out Without Editing






TIP


At any time while your file is checked out, you can change your mind and cancel the check out.

Click  to open the drop-down menu again and then click . The information at the bottom of the drop-down menu will indicate that the file is unlocked and available to be checked out.

When you edit a file in Spitfire, that file is automatically checked out. It is also possible to just check out a file (to prevent other people from editing it for a period of time, for example).

To just check out a file:

1. Click  on the line item of the file you want to check out.
2. From the File Options menu, select  **Check Out** the file. The  icon will change to  on the row. The  icon alerts all users that the file is checked out.

Note: the information at the bottom of the drop-down (by the  icon) indicates that the file has been checked out, by whom and since when.




Editing Files





TIP

If you are not sure if an icon means "view" or "edit" a file, mouse over the icon to find out.

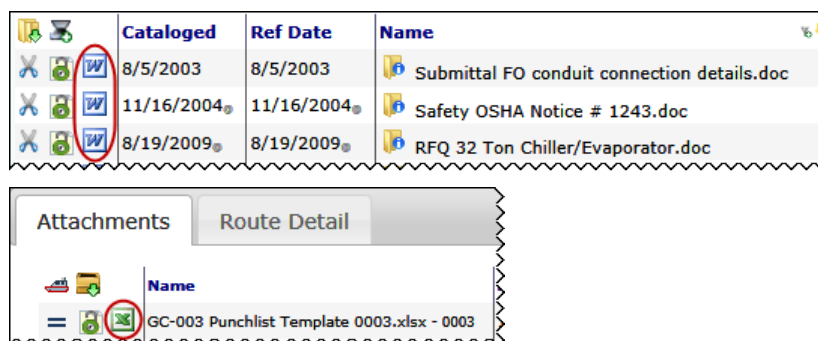
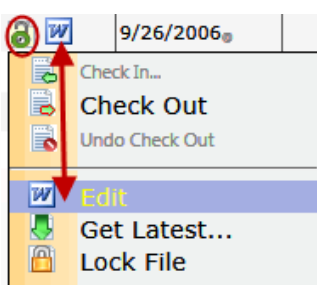
How and if you can edit a file depends on several factors:

- If you have permission to edit the file through your Spitfire role.
- If an edit icon has been established for the file type.
- If you have the means (software) to edit the file on your workstation. (In other words, would you be able to edit the file outside of Spitfire?)

If a way to edit the file has been set up, an icon will appear to the right of the  icon. This icon could look like

-  (default for Microsoft Excel)
-  (default for Microsoft Word)
-  (default for Microsoft Project)
-  (default for Adobe Acrobat)

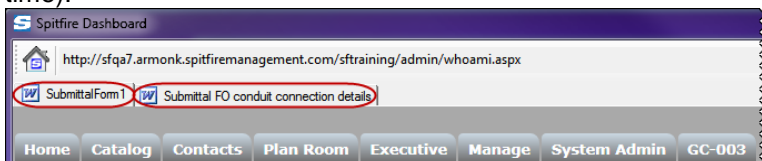
These icons can appear wherever files are listed. The icons are also available from the File Options menu, where applicable. Click the icon to edit the file.



To edit a file:

1. Click the appropriate icon on the file row. The file will be automatically checked out and will open in the appropriate editing application.

Note: when a Microsoft Word or Excel file is opened for editing, a file tab appears at the top of the dashboard window – one tab per file currently open (because you can edit multiple files at one time).





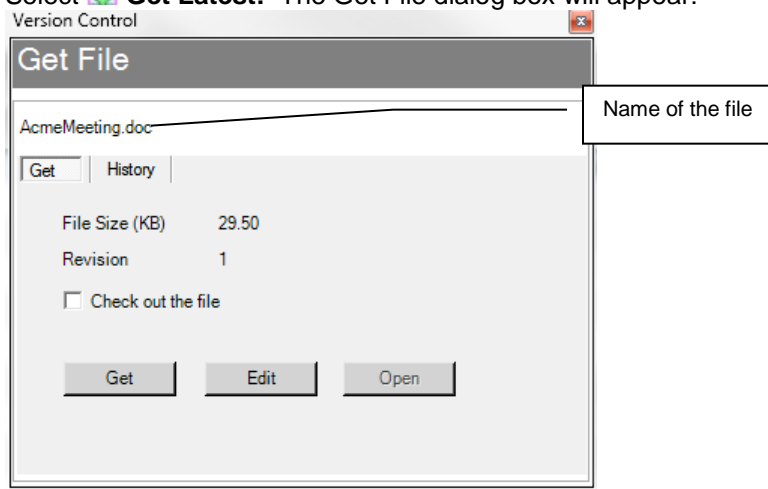
2. Edit the file and save your changes.
3. Close the file (i.e., the application). The file will be automatically checked in. If the file is a Microsoft Word or Excel file, the tab that appeared at the top of the dashboard window will now go away.

Alternate Revision Workflow


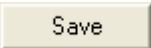






The edit icon allows you to make changes to your file as needed, while you are in sfPMS. It is also possible for you to get the latest approved version of a file, copy it to some other location, make changes to the file over time, and eventually check your revised file back in.

To edit a file elsewhere:

1. Click  at the row of the file you want to edit. The File Options menu will open.
2. Select  **Get Latest:** The Get File dialog box will appear:



3. Click the **Check out the file** checkbox to check the file out.




4. Click . A browser window will appear.
5. Navigate to a location on your computer or network where you'd like to save the copy of this file then click .
6. Click  to close the Get File box.
7. Outside of Spitfire, at whatever time, make changes to your file. Your file will remain checked out during this time.
8. When you are ready to check the file back into Spitfire, click  at the file row.
9. Select  **Check In**. The Check In File dialog box will appear.
10. Click  to locate the edited copy of the file on your hard drive/network.
11. Enter a **Source Rev #** if appropriate. (Use this field to cross-reference your customer's or vendor's version number.)
12. (*optional*) Click any of the checkboxes if you want any of the check in options:
 - **Route File**: this option is the same as the [Route This](#) option (see page 60).
 - **Approve File**: this option approves the file, if automatic approval has been turned off at your site.
 - **Keep checked-out**: this option is the equivalent of checking the file in and immediately checking it again—your newly revised file becomes the latest approved version, but the file appears as still being checked out.
13. Click  then close the Check In File dialog box. If you click  that now appears, it will indicate that the file was checked in, by whom and when:








Versions of the File

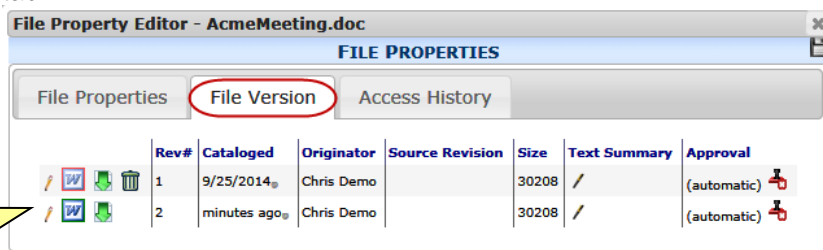
When someone checks in a file, that version of the file becomes the “latest” version. You can get the latest version of the file as well as previous versions. If you have permission to do so, you can view all versions of the file without checking the file out.


To view all versions of a file:

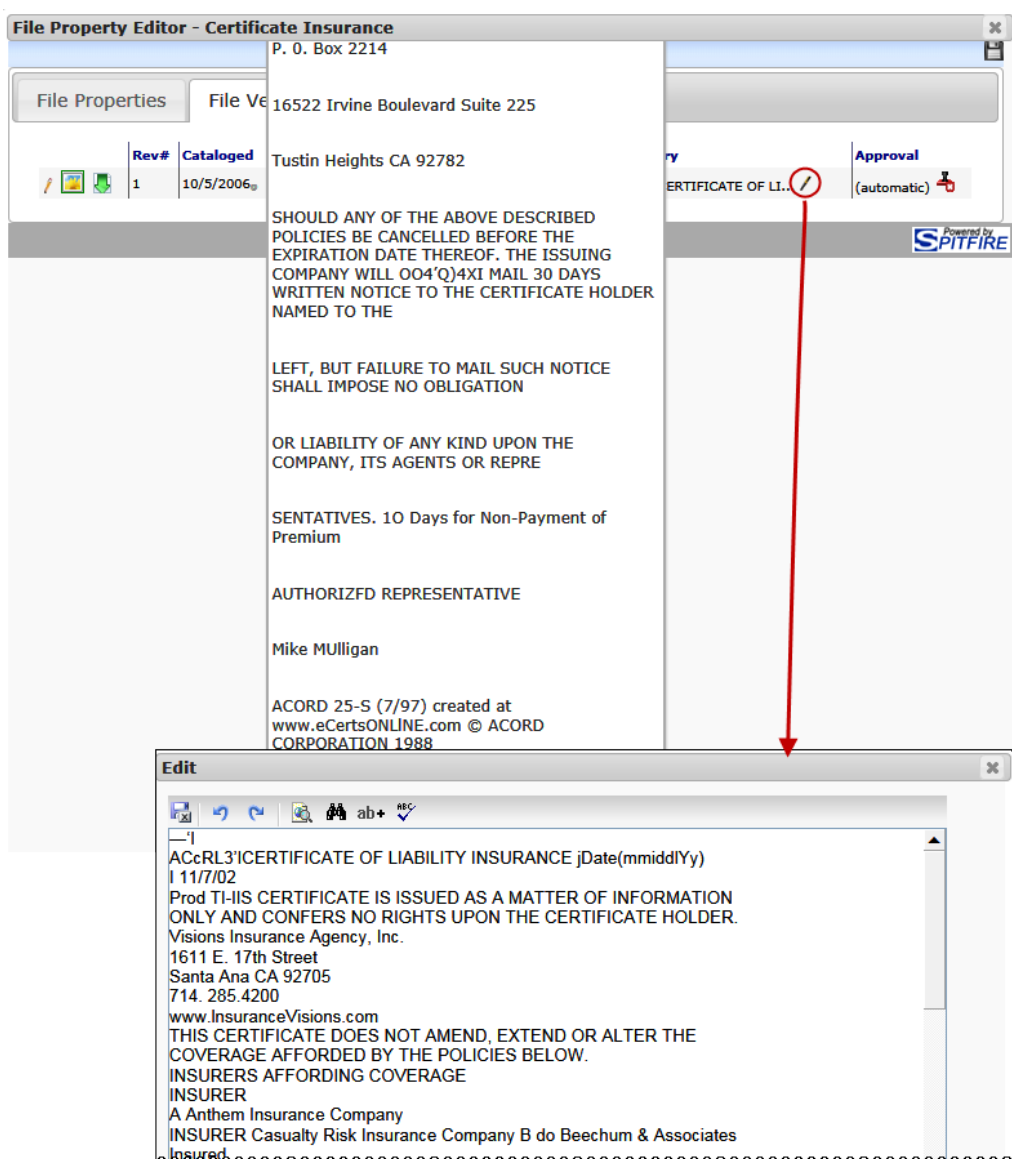
1. Click  or  to open the File Options menu for the file you want.
2. Select  **Properties**.

3. The File Property Editor dialog box will appear. Click on the **File Version** tab. Each version of the file is listed in the File Version tab.

Click  to edit the version information;  or  to open a read-only copy of an older or latest approved version of the file in the Spitfire Viewer;  to get a copy of the file version to save on your computer (in the same way as Get Latest) and  to delete the version.



Note: the **Text Summary** column shows an extracted plain text abstract for non-text files (such as .TIF or .PDF) when possible. Mouse over the column to see the text (if any). Click  to edit that extract or to add any kind of note to other file types.





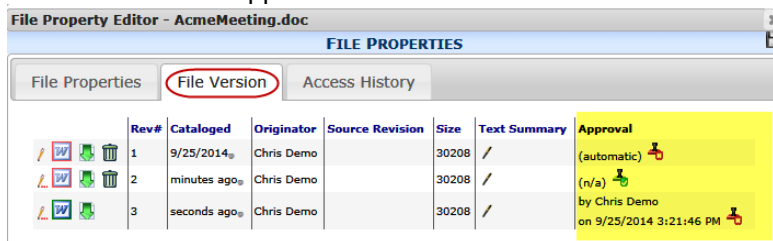
File Approval

If your site has automatic file approval (set up by default), every version of a file that you check in will be approved. However, if your site has turned off automatic file approval, manual approval on a version is needed before all users can view and access that version. In such a situation, if you check in a file without approving it, only those users with permission to see unapproved files will be able to access it; others will access the latest approved version.



File Properties

To approve/un-approve a file through File Properties:

1. Click  to open the File Options menu for the file you want.
2. Select  **Properties**.
3. Click on the File Version tab. The Approval column tells you if each file version is approved or not.



- **(automatic)** means that this version of the file was approved automatically when the file was catalogued or checked in.
- **(n/a)** means that this version of the file is not approved. It can be approved by someone with the **PART | Catalog File Version History (RS)** role capability.
- **By person on date time** means that this person approved the file on the specified date and time.

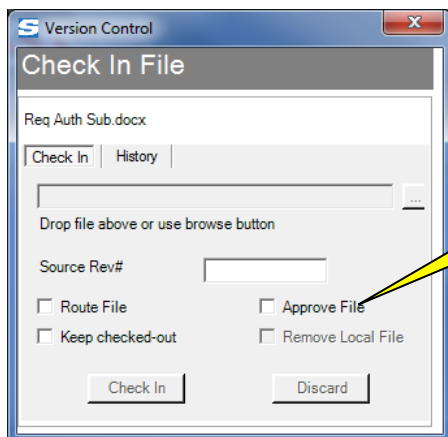
4. Click  to approve a file that is not approved, or  to unapprove a file that is currently approved.

TIP

For more information about role capabilities see the [Designing User Roles](#) technical white paper.

Check In

You can also approve a file at the Check In File dialog box.



Click to approve the file during check in.



Add Files










You can also approve files when uploading them [through the Add Files](#) too. See page 37 for more information.

View Latest Unapproved Version

If there is a version of the file that has not yet been approved since the latest approved version, a new choice appears on the File Options menu.

To view the latest unapproved version of a file:

- Click  to open the Files Options menu for the file you want, then click  **View Latest:**

		9/25/2014	9/25/2014	AcmeMeeting.doc
	Check In...			AGC450DB
	Check Out	/2009		APP 2 ARCHITECT.PDF
	Undo Check Out	/2009		APP 2 OWNER.PDF
	Edit			Cert_Ins_Liab
	Get Latest...			Certificate Insurance
	View Latest			City Water and Sewer
	Lock File			City Water and Sewer

File Export

If you need copies of several files on your computer or perhaps a CD (for archival purposes, for example), you can export a number of files all at once from sfPMS. Exporting does not remove files from sfPMS and exported copies no longer have any relation to other files or versions in sfPMS.

You can export files from both the Catalog Dashboard and a document's Attachment tab.

From Catalog Dashboard

To export files from the Catalog:

1. Because the Export Files tool uses the current list of files, use the filters and/or file folders to narrow down the files to just those you want to export, for example:

Cataloged	Ref Date	Name	Size	Project	Project Name	Source Contact	Type
10/5/2006		Certificate Insurance	2.0MB	GC-003	Northern Lights Office Bldg		Cert & Appr
10/11/2006		City Water and Sewer Permit Receipt	24KB	GC-003	Northern Lights Office Bldg		Permits
12/23/2006	5/10/2006	coho_pr_gc003_01.tif	496KB	GC-003	Northern Lights Office Bldg	Coho Asphalt and Concrete	Pay Request
10/27/2006	10/27/2006	Commitment 32 Ton Chiller/Evaporator.doc		GC-003	Northern Lights Office Bldg	Universal HVAC Specialties	Commitment
4/20/2007	4/20/2007	constructionschedule.pdf	23KB	GC-003	Northern Lights Office Bldg		Schedule

Note: you can use the filters to search for documents also. The Export Files tool will list the files attached to those documents only.

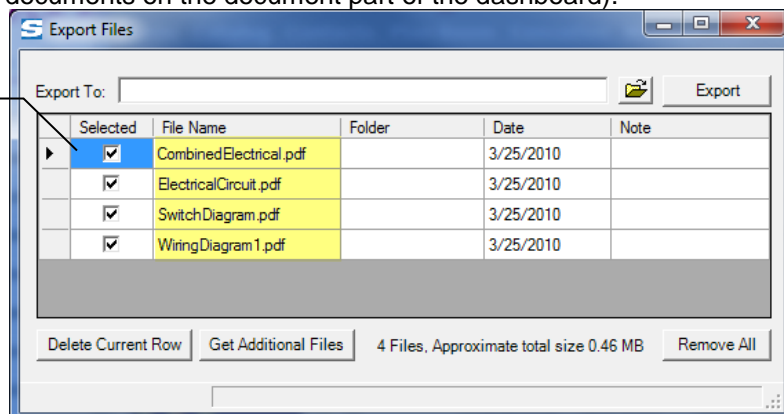
Date	Title	Type	DocNo	Project	Project Name	Source Contact	Status
9/16/2014	32 Ton Chiller/Evaporator	Bid Package	0327	GC-003	Northern Lights Office Bldg		
9/16/2014	Bids for: 00002-2, Additional electrical work	Bid Package	0329	GC-003	Northern Lights Office Bldg	Lighting Ventures	
9/16/2014	Bids for: 00002-1, Additional work to meet	Bid Package	0328	GC-003	Northern Lights Office Bldg	Lighting Ventures	


2. Click to open the Options Menu, then select **Export Files:**

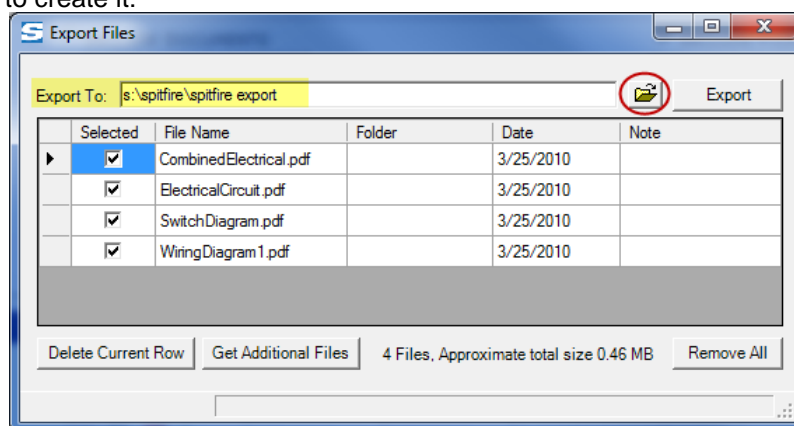
- Add Files
- Export Files**
- Refresh Page

The Export Files window will appear, listing the files currently on the files part of the dashboard (and/or the files attached to the documents on the document part of the dashboard).

You can de-select or re-select any particular file. If you right-click on any row, you will get options to clear, remove and select the row or all rows.



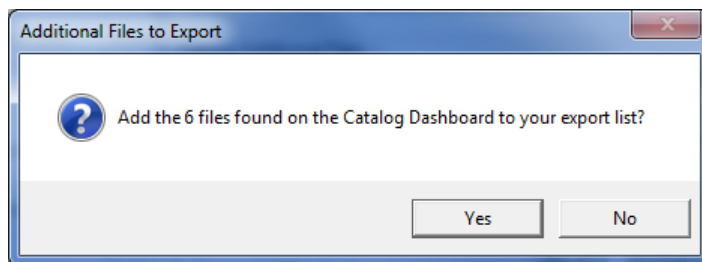
3. Click  to browse for the folder to which you will export your files or type a folder path in the Export To field. If you type a folder name that does not yet exist, you will be asked if you want to create it:



4. (optional) If you realize that you want to export other files also, go back to your Catalog and use the filters or folders to find other files.

Note: you can either close the Export Files window or keep it open while you do this. In either case, the files you already chose to export will remain in the export list.

- o If you closed the Export Files window, click  to add the new files to the list.
- o If you kept the Export Files window open, click . A confirmation box will tell you how many files you will be adding from the Catalog, for example:



- If you want to add all the files to the Export File list, click ; if there are too many files and you want to filter them more, click and go back to the Catalog.

TIP

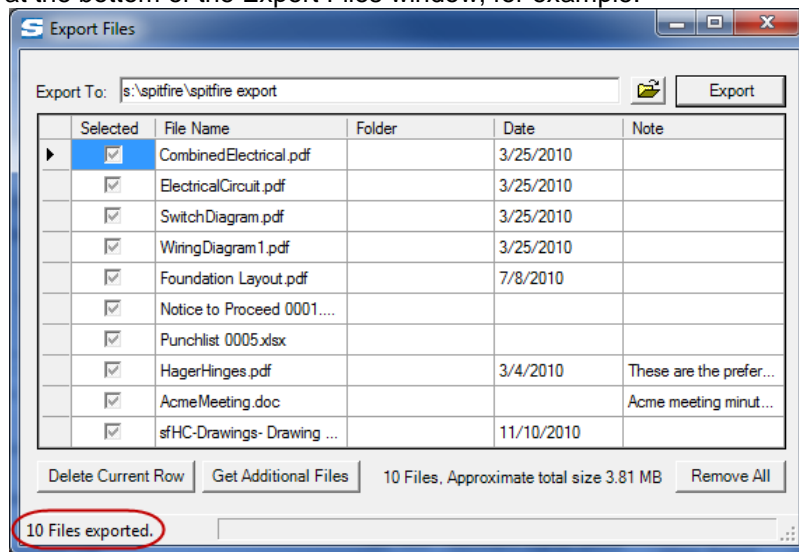
Once you start exporting, if you want to stop the process, click

Files that have not already been exported will remain in the Export Files window for you to delete or export at another time.

5. When you are ready to export, click . After all files have been exported, a message to that effect appears:



6. Click . The number of files exported will also appear at the bottom of the Export Files window, for example:









7. Click to clear the list then to close the Export Files window.

From Attachment Tab

You can export all files that are attached to a document or just files that are attached to a particular Item on the document.

To export document attachments:

1. Open the document that contains the files (in the Attachment tab) that you want to export.
2. (*optional*) If you want to export only files that are attached to a particular Item, go to the Items tab and expand that Item.
3. Click  on the Attachment tab.

Attachments		Route Detail		
		Name	Size	Note
		RFQ 32 Ton Chiller/Evaporator.doc	31KB	
		web_capital_construction	265KB	
		32 Ton Chiller/Evaporator Bid Package - 0327		

The Export Files window will open.

4. Proceed with the [instructions on page 72](#).

File Download


If you would like copies of certain files on your computer, you can download a zipped file of those files. Downloading does not remove files from sfPMS and downloaded copies no longer have any relation to other files or versions in sfPMS.

You can download files from both the Plan Room Dashboard and a document's Attachment tab. In both cases, you download all files attached to a particular document.











From Plan Room Dashboard

To download files from the Plan Room:

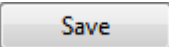


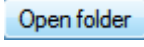
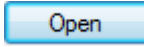
Note: one project must be selected in the Plan Room before the Available Documents are listed.

1. At the Available Documents list, click  at the document row that holds the files that you want to download.

that holds the files that you want to download.

PROJECTS					
Site Photo	Project Name	Location	Description		
	Northern Lights Plaza GC-003 	84 Business Park Drive Armonk, NY 10504 (map)	This \$27.5M plaza will use plaza retail shop space, an established funding and now come available		
AVAILABLE DOCUMENTS					
	Date	%	Due	Title	Type
	9/11/2014		12/12/2014 	Drawings Electrical	Drawings
	9/17/2014		10/18/2014	Trane CGACD104 100 Ton 460V Chiller	Vendor Bid
	9/26/2014		9/27/2014 	16000 Electrical - Addendum	Vendor Bid
	9/17/2014		10/18/2014 	16000 Electrical	Vendor Bid
	9/26/2014		9/26/2014 	Drawings Architectural	Drawings

sfPMS will gather data and then the File Download dialog box will appear.

2. Click  to specify a location (and, optionally, a different filename) for the zip file.
3. Click  again. When the download is complete, the dialog box will say so.
4. You can
 - o Click  to close the dialog box (and deal with your zipped file separately) or
 - o Click  to get to the folder that holds your zipped file or
 - o Click  to see the contents of the zipped file.

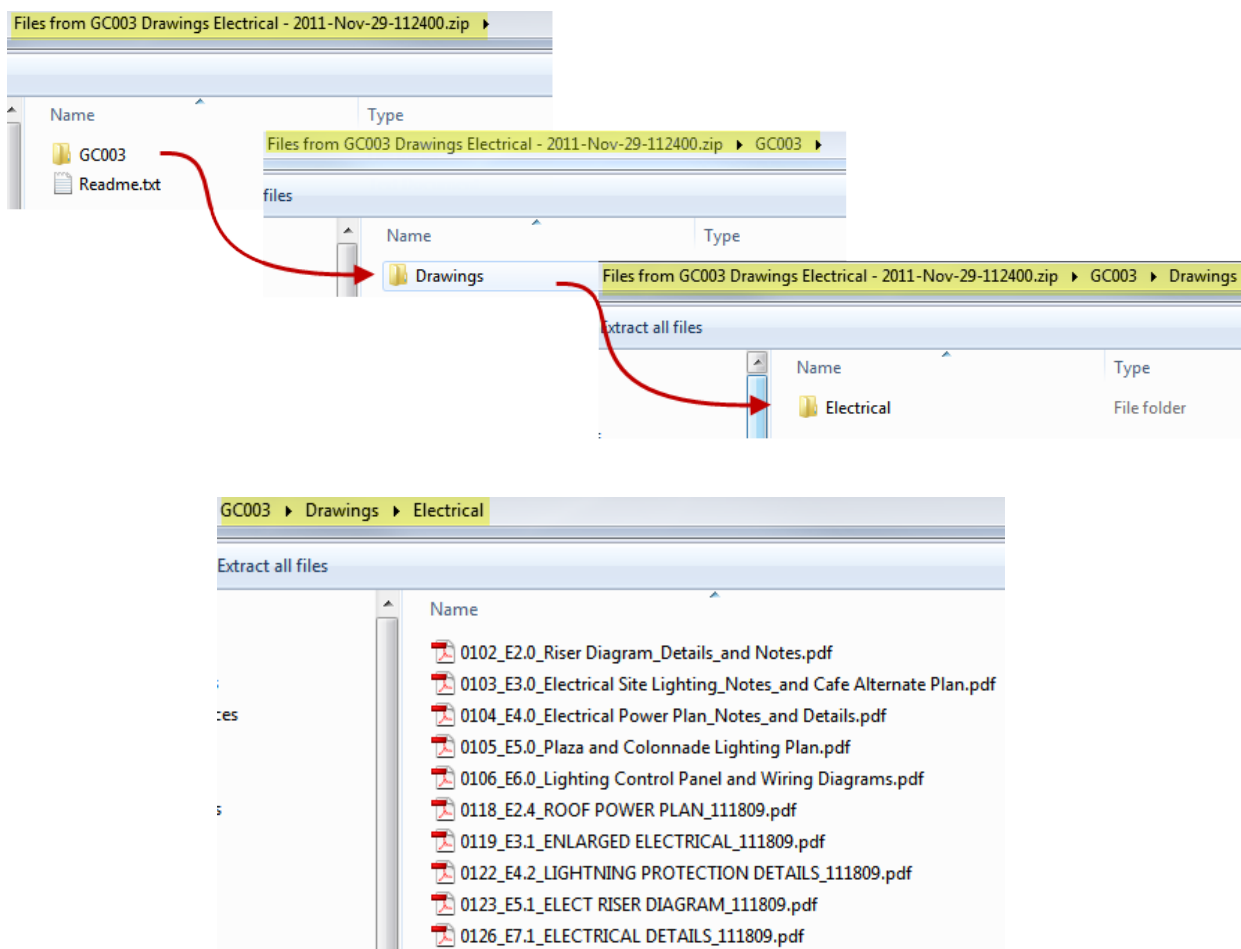
To unzip the downloaded file:

1. Get to the folder that holds your zipped file.

Name	Date modified	Type	Size
Files from GC003 Trane CGACD104 ...	11/29/2011 11:32 ...	Compressed (zipp...	198 KB
Files from GC003 Drawings Electrica...	11/29/2011 11:26 ...	Compressed (zipp...	4,430 KB

2. Double-click on the filename. A new directory, containing the contents of the zipped file plus a ReadMe file, will appear.


Note: files are organized by project, Doc type and Subtype. You will need to drill down to get to the attached files.

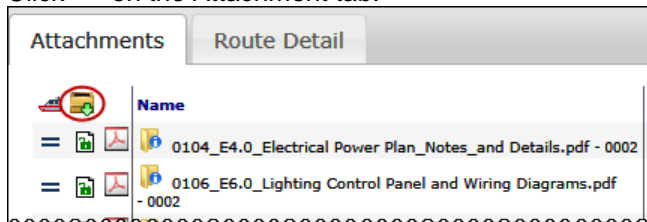


From Attachment Tab

You can download all files that are attached to a document.

To download document attachments:

1. Open the document that contains the files (in the Attachment tab).
2. Click  on the Attachment tab:




The File Download dialog box will appear.

3. Proceed with [step 2 on page 75](#).

Mobile Attach Via Email

When you are using sfPMS from a mobile device such as a tablet, the easiest way to attach a file to a document is through the email functionality of Spitfire.


From the Home Inbox

Documents that have been set up for this functionality will display the  icon on the document row.

To attach a file to a document via email:

1. Click  at the desired document row.

TIP

In order to see the  icon on your Inbox, you must have a role with the DOC | User Inbox Inbound Email Attachment Link capability, limited by the Doc type.

See the [Designing User Roles](#) technical white paper for more information.




(You may be asked which email app you want to use to complete the action. If so, select one.)

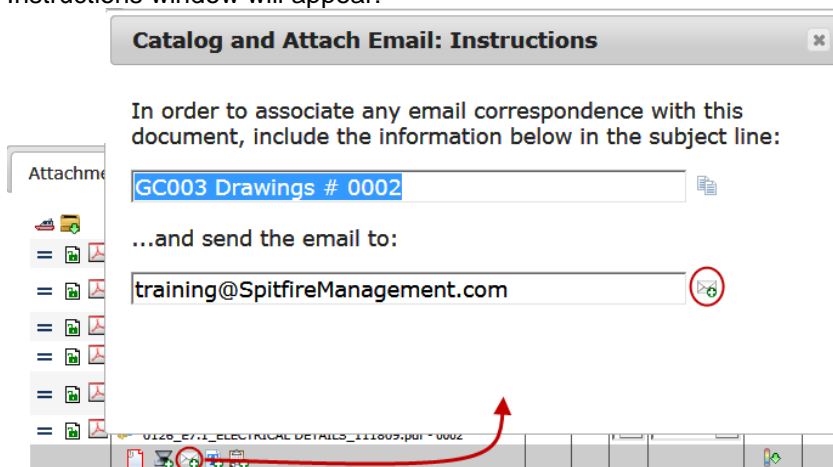
2. When the email opens, attach a file or photo to it as you would attach any file to an email on your mobile device.
Important: Leave the To address and Subject line as is. This information tells sfPMS where to attach the file.
3. Send the email. The email will get processed by sfPMS and the attached file will appear on the document's Attachment tab, as well as in the Catalog.


From the Attachments Tab

All documents include the  icon on the Attachments tab.

To attach a file to the document via email:

1. Open the document to which you want to attach a file.
2. Click  on the Attachments tab. A Catalog and Attach Email: Instructions window will appear:



3. Click  on the window. (You may be asked which email app you want to use to complete the action. If so, select one.)
4. When the email opens, attach a file or photo to it as you would attach any file to an email on your mobile device.
Important: Leave the To address and Subject line as is. This information tells sfPMS where to attach the file.
5. Send the email. The email will get processed by sfPMS and the attached file will appear on the document's Attachment tab, as well as in the Catalog.

Appendix A: Watched Folder


You can set up a “watched” folder on your computer as another way to add files to the Catalog. When you drag-and-drop or save files into your watched folder, the Add Files window appears, enabling you to directly add those files to sfPMS.

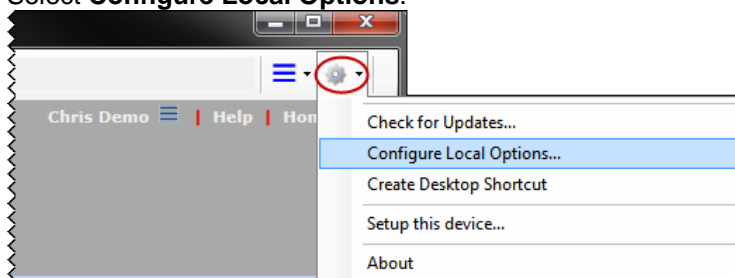
Note: a watched folder should be used exclusively for files that are to be added to the Spitfire Catalog. When the contents of this folder are uploaded into Spitfire, they are removed from your local hard drive. You should not use this feature if you want to keep local copies of these files. Also, your watched folder should not point to your desktop or “My Documents”.

Folder Set-Up


Before you can use a Watched Folder, you must designate its location on your computer (see note above). You do this through the Dashboard Configuration.

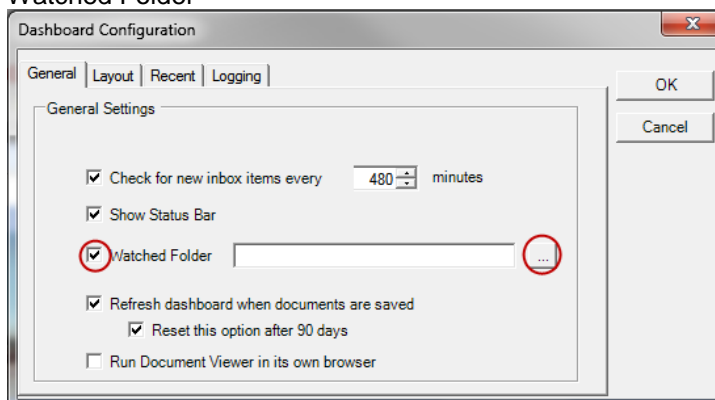
To set up your Watched Folder:

1. Click  at the top of your sfPMS window.
2. Select **Configure Local Options**.



The Dashboard Configuration box will appear.

3. Click the checkbox next to **Watched Folder**.
4. Click  to browse for the folder you want to designate as your Watched Folder




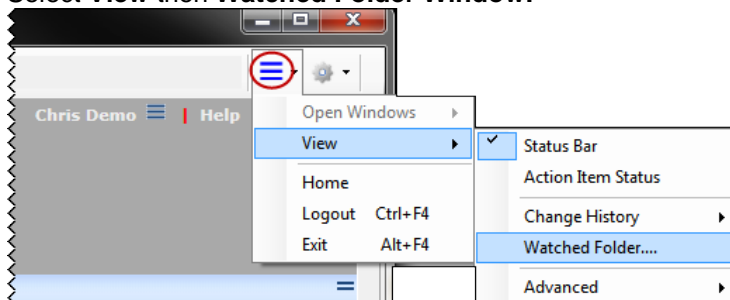
5. Click .

Use of the Watched Folder

The Watched Folder serves as a “stepping stone” when you want to copy certain types of files (such as emails or PDF files) into the Spitfire Catalog.

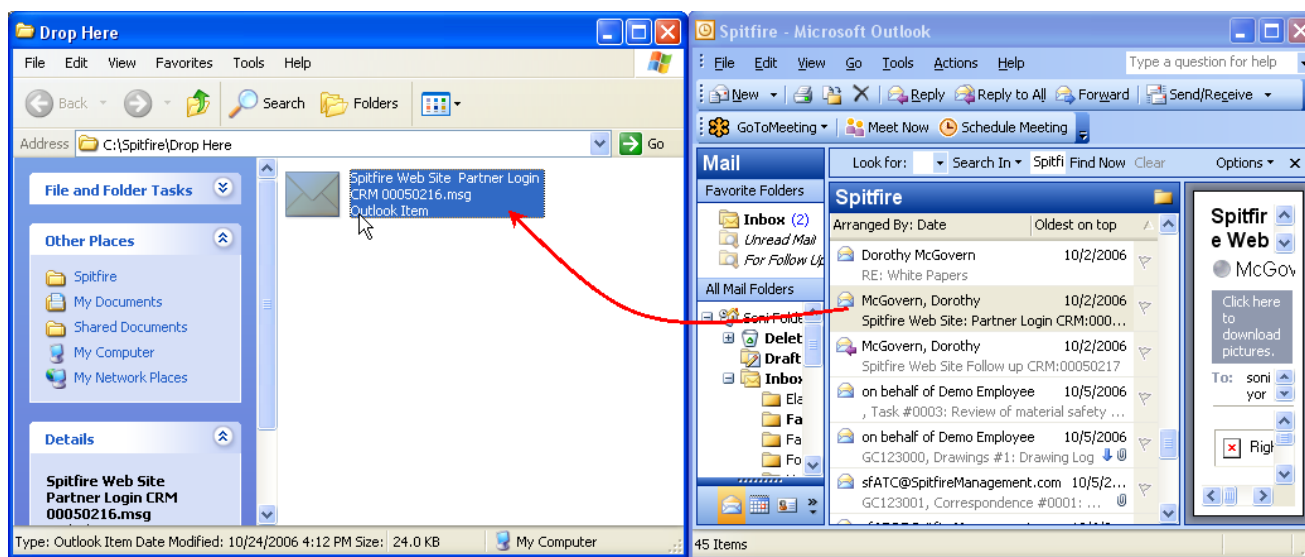
To add files through the Watched Folder:

1. Click  at the top of the sfPMS window.
2. Select **View** then **Watched Folder Window**.



A folder window will appear.

3. Drag-and-drop a file from any source (e.g., Microsoft Outlook, a USB thumb driver, your desktop). The file will appear briefly in the folder window, for example:





The Add Files tool will then appear with the name of your file filled in, for example:

TIP

While no field in the General tab is required, it is useful to look up a **Project** as well as to browse for a **Folder**.

The 'Add Files' dialog box is shown with the 'General' tab active. The 'Source Document' section contains fields for Name (Spitfire Web Site Partner Login), Doc #, Rev #, and Batch #. Below this are fields for Type, Note, Other, Project, Ref. Date (set to 11/11/2010), Source Contact, Internal, and Folder (set to root). The 'Added file' section at the bottom is empty.

4. Fill in other fields under the General tab then click .
5. Click  on the Add Files tool and the folder window to close each.